# TOPIC 1: INTRODUCTION TO THE SAM II HR/PAYROLL DATA WAREHOUSE WEB INTERFACE

The SAM II HR/Payroll Data Warehouse is a collection of information captured from the online SAM II desktop system. The data warehouse is loaded nightly*, and the data is held throughout the day to facilitate accurate, timely reporting. The data warehouse stores this information in a DB2 database that can be accessed using two methods: Ad-Hoc reporting tools such as Focus and MS Access (back-end), and a user-friendly web interface (front-end). This class focuses on use of the web interface, which can be accessed using a web browser such as Internet Explorer or Netscape Navigator.

**Note:** The data in the SAM II HR/Payroll Data Warehouse is for inquiry and reporting purposes only. Transaction and document processing must be done in the online SAM II desktop system.

**After completing this topic, you will:**

- Understand the definitions of Standard Reports, Personal Reports, and Flexible Reports.
- Understand the various Areas of Analysis available in the SAM II HR/Payroll Data Warehouse Web Interface.

***Some payroll-related data is loaded with each pay cycle, rather than nightly.**

# NOTES

# WEB INTERFACE REPORT TYPES

The SAM II HR/Payroll Data Warehouse Web Interface can be used to view three different types of reports: Standard Reports, Personal Reports, and Flexible Reports.

**STANDARD REPORTS**

Standard Reports are reports that are pre-defined and are available to all users. Standard Reports usually contain reporting information that is desired by multiple agencies and is common among reporting requirements statewide. These reports may be printed one page at a time using the web browser's print feature.

**PERSONAL REPORTS**

Personal Reports are reports created by a user using the Data Warehouse Web Interface. These reports may be saved under a User ID, and can be downloaded as Tab-Separated-Value files (.TSV) or as Fixed Width files (.TXT). These reports are identified in the Data Warehouse Web Interface with the following icon: 

**FLEXIBLE REPORTS**

Flexible Reports are Personal Reports that have been identified as useful to other parties. If a Personal Report has also been designated as a Flexible Report, all users with security access for the particular agency will be able to view the report (as opposed to a Personal Report, where only the user who created the report is able to view the report). Like Personal Reports, Flexible Reports may also be downloaded as .TSV or .TXT files. Flexible Reports are identified in the Data Warehouse Web Interface with the following icon: 

# AREAS OF ANALYSIS

**EMPLOYEE HISTORY**

**AGENCY DETAIL**

- **Benefits**
- **Deductions**
- **Employee**
- **Leave**
- **Payroll**
- **Payroll Accounting**
- **Position**
- **Position History**

**SUMMARY**

- **Benefits**
- **Deductions**
- **Demographics**
- **Employee**
- **Leave**
- **Payroll**
- **Position**

# AREAS OF ANALYSIS

To ease reporting and data selection, the data available to SAM II HR/Payroll Web Interface users is organized into various Areas of Analysis. The three main Areas of Analysis are *Employee History*, *Agency Detail*, and *Summary*. *Agency Detail* areas contain agency- and employee-specific information. *Summary* areas contain both agency-specific and statewide information, but the data is not employee-specific. The *Agency Detail* and *Summary* areas are broken down further into smaller Areas of Analysis. Each Area of Analysis is discussed below.

### EMPLOYEE HISTORY

The *Employee History* area provides detailed historical information on an individual employee basis. Users with access to this area may view historical information on any state employee. Types of information include agency, organization, and pay rate data.

### AGENCY DETAIL BENEFITS

The *Agency Detail Benefits* area provides the information needed for reports concerning employee benefit payout amounts and activity. The items classified as benefits in SAM II HR/Payroll are those that exist on the Employee Fringe Benefit Type table (BENT). These include both the employer and employee paid benefits. Available reporting criteria include benefit category and title information. This information is provided for a particular agency/organization or for all state agencies (OA Reporting only).

### AGENCY DETAIL DEDUCTIONS

The *Agency Detail Deductions* area provides the information needed for reports concerning employee deduction amounts and activity. The items classified as deductions in SAM II HR/Payroll are those that exist in on the Employee Deduction Type table (DEDT). These include both the employer and employee deductions. Available reporting criteria include deduction category and title information. This information is provided for a particular agency/organization or for all state agencies (OA Reporting only).

### AGENCY DETAIL EMPLOYEE

The *Agency Detail Employee* area provides the ability to view detailed information on employees within an agency. Available reporting criteria include Employee Status and Personnel Action, Titles, Grades, and other employee attributes. Reported information will include all employees in an agency fitting the selection criteria. This information is provided for a particular agency/organization or for all state agencies (OA Reporting only).

# AREAS OF ANALYSIS

**EMPLOYEE HISTORY**

**AGENCY DETAIL**

- **Benefits**
- **Deductions**
- **Employee**
- **Leave**
- **Payroll**
- **Payroll Accounting**
- **Position**
- **Position History**

**SUMMARY**

- **Benefits**
- **Deductions**
- **Demographics**
- **Employee**
- **Leave**
- **Payroll**
- **Position**

# AREAS OF ANALYSIS

## AGENCY DETAIL LEAVE

The *Agency Detail Leave* area provides the user with the capability of viewing employee leave balance information at various degrees of summarization. Available reporting criteria include leave category or policy, title, work location, and resident location. This information is provided for a particular agency/organization or for all state agencies (OA Reporting only).

**Note:** Leave amounts are expressed in the Data Warehouse as minutes only (e.g., 3 hours and 15 minutes would be displayed as "195.00", *not* 3:15.

## AGENCY DETAIL PAYROLL

The *Agency Detail Payroll* area provides the user with the capability of viewing employee payroll information to facilitate detailed analysis of an agency's payroll data. Available reporting criteria include pay category and pay class. This information is provided for a particular agency/organization or for all state agencies (OA Reporting only).

## AGENCY DETAIL PAYROLL ACCOUNTING

The *Agency Detail Payroll Accounting* area provides the user with the capability of viewing employee pay information for payroll amounts, deduction amounts, and fringe benefit amounts. Reported information can be limited to a single Gross To Net (GTN) Run Number, Employee, Appointment ID, Check Date, Bank Account, Check Number, and/or JVP Document ID. This information is provided for a particular agency or for all state agencies (OA reporting only).

## AGENCY DETAIL POSITION

The *Agency Detail Position* area provides data to support the duties and decisions necessary for staff planning, position monitoring, and position analysis. It allows monitoring of position status by position. Reported information will include all positions in an agency that fit the selection criteria. This information is provided for a particular agency/organization or for all state agencies (OA Reporting only).

## AGENCY DETAIL POSITION HISTORY

The *Agency Detail Position History* area provides detailed historical information on an individual position basis. Users with access to this area may view historical information on any position in any agency they are authorized for, as well as historical incumbent information.

# AREAS OF ANALYSIS

**EMPLOYEE HISTORY**

**AGENCY DETAIL**

- **Benefits**
- **Deductions**
- **Employee**
- **Leave**
- **Payroll**
- **Payroll Accounting**
- **Position**
- **Position History**

**SUMMARY**

- **Benefits**
- **Deductions**
- **Demographics**
- **Employee**
- **Leave**
- **Payroll**
- **Position**

# AREAS OF ANALYSIS

## SUMMARY BENEFITS

The *Summary Benefits* area provides the information needed for agencies to generate reports concerning employee benefit payout amounts and activity. The items classified as benefits in SAM II HR/Payroll are those that exist on the Employee Fringe Benefit Type table (BENT). These include both the employer and employee paid benefits. This area is similar to the *Agency Detail Benefits* area, except that the information in this area will not identify individual employees. This information can be selected for a particular agency/organization or for all state agencies.

## SUMMARY DEDUCTIONS

The *Summary Deductions* area provides the user with the capability of viewing employee deduction information at various degrees of summarization. The items classified as deductions in SAM II HR/Payroll are those that exist in on the Employee Deduction Type table (DEDT). These include both the employer and employee deductions. This area is similar to the *Agency Detail Deductions* area, except that the information in this area will not identify individual employees. This information can be selected for a particular agency/organization or for all state agencies.

## SUMMARY DEMOGRAPHICS

The *Summary Demographics* area provides the user with the capability of viewing employee demographic information grouped by any agency/org level. This area will allow the analysis of employee demographic information at a specific point in time. The information in this area will not identify individual employees. Instead, users will receive a count of the number of employees that meet the entered criteria. This information can be selected for a particular agency/organization or for all state agencies.

**Note:** The data offered in the *Summary Demographics* area is very similar to the data in the *Summary Employee* area. However, the *Summary Employee* area stores multiple records per day per employee, while the *Summary Demographics* area stores only one record (the last) per day per employee. For example, if an employee's status changed five times during one day, a report ran from the *Summary Employee* area would show all five statuses, while a report ran from the *Summary Demographics* area would only show the last and final status of the day. Because of this, the amount of available data in the *Summary Employee* area is much larger than in the *Summary Demographics* area. Therefore, queries against the *Summary Employee* area will take longer, and consequently cost more, than queries against the *Summary Demographics* area. Users should try to use the *Summary Demographics* area whenever possible. All of the data elements in the *Summary Demographics* area are also found in the *Summary Employee* area.

# AREAS OF ANALYSIS

**EMPLOYEE HISTORY**

**AGENCY DETAIL**

- **Benefits**
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- **Position History**

**SUMMARY**

- **Benefits**
- **Deductions**
- **Demographics**
- **Employee**
- **Leave**
- **Payroll**
- **Position**

# AREAS OF ANALYSIS

### SUMMARY EMPLOYEE

The *Summary Employee* area provides the ability to view employee information at various degrees of summarization. This area is similar to the *Agency Detail Employee* area, except that the information in this area will not identify individual employees. Instead, users will receive a count of the number of employees that meet the entered criteria. This information can be selected for a particular agency/organization or for all state agencies.

### SUMMARY LEAVE

The *Summary Leave* area provides the user with the capability of viewing employee leave information at various degrees of summarization. This area is similar to the *Agency Detail Leave* area, except that the information in this area will not identify individual employees. This information can be selected for a particular agency/organization or for all state agencies.

**Note:** Leave amounts are expressed in the Data Warehouse as minutes only (e.g., 3 hours and 15 minutes would be displayed as “195.00”, *not* 3:15.

### SUMMARY PAYROLL

The *Summary Payroll* area provides the user with the capability of viewing employee payroll information at various degrees of summarization. This area is similar to the *Agency Detail Payroll* area, except that the information in this area will not identify individual employees. This information can be selected for a particular agency/organization or for all state agencies.

### SUMMARY POSITION

The *Summary Position* area provides the ability to view position information at various degrees of summarization. This area is similar to the *Agency Detail Position* area, except that the information in this area will not identify individual positions. Instead, users will receive a count of the number of positions that meet the entered criteria. This information can be selected for a particular agency/organization or for all state agencies.

# NOTES

# TOPIC 2: SYSTEM NAVIGATION

This topic will cover basic navigation within the SAM II HR/Payroll Data Warehouse Web Interface. The web interface has several navigation tools to facilitate efficient use of the Data Warehouse. Before learning how to create, save, and view reports, users should be familiar with these tools.

**Note:** The SAM II Data Warehouse Homepage is the access point for the Financial and Budget Web Interfaces in addition to the HR/Payroll Web Interface. The navigation tools discussed in this topic are not specific to the HR/Payroll portion—they are used for the Financial and Budget sections as well.

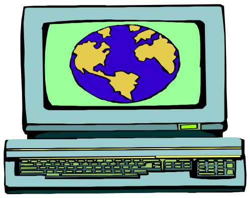
**After completing this topic, you will:**

- Be able to access the SAM II HR/Payroll Data Warehouse Web Interface using Internet Explorer.
- Understand the features and functions of the SAM II Data Warehouse Homepage.
- Be able to navigate through the SAM II Data Warehouse using the toolbar.

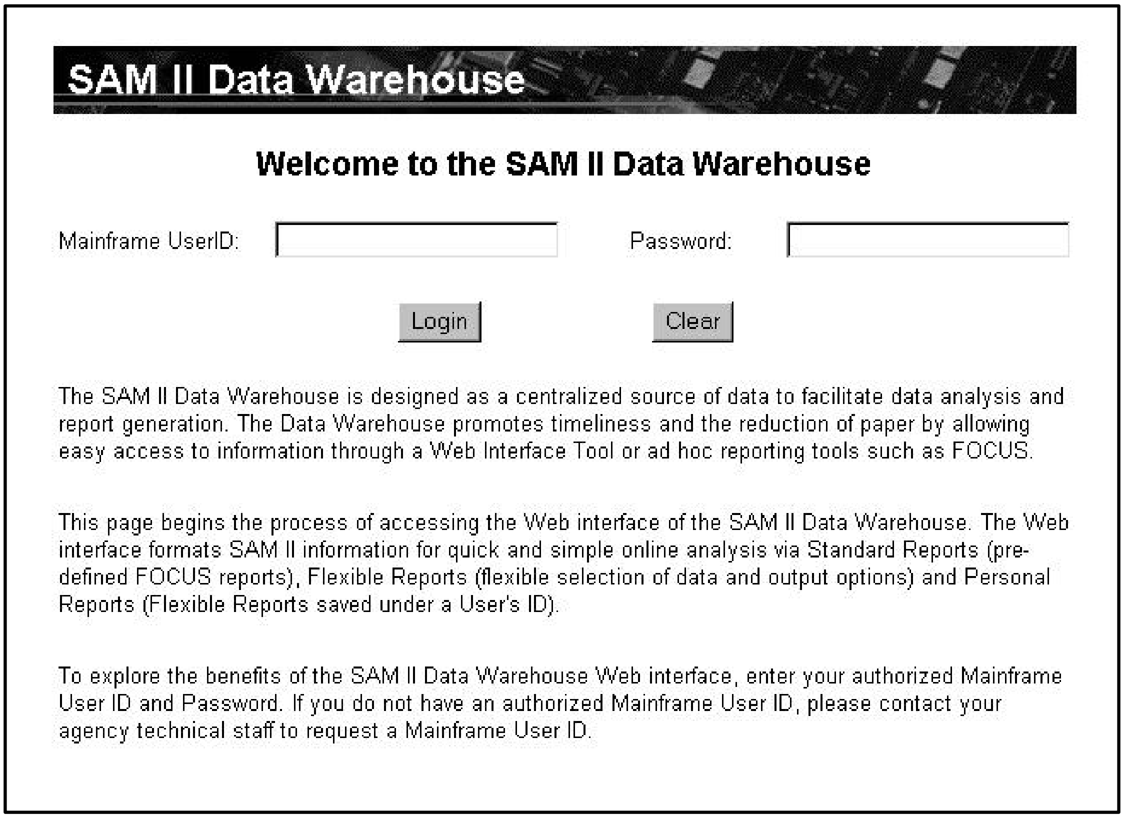
# NOTES

# TERMINOLOGY

| | |
|---|---|
| **Area of Analysis** | The reporting areas for the SAM II HR/Payroll Data Warehouse Web Interface: Employee *History*, *Agency Detail Benefits*, *Agency Detail Deductions*, *Agency Detail Employee*, *Agency Detail Leave*, *Agency Detail Payroll*, *Agency Detail Position*, *Agency Detail Position History*, *Summary Benefits*, *Summary Deductions*, *Summary Demographics*, *Summary Employee*, *Summary Leave*, *Summary Payroll*, and *Summary Position*. |
| **Mainframe ID and Password** | An authorized set of alphanumeric characters assigned by the System Administrator for users to gain access to the SAM II Data Warehouse database on the mainframe. |
| **Back End** | The DB2 database that contains the information for the SAM II Data Warehouse programs. These programs are used to load the information collected from the SAM II operational system to the SAM II Data Warehouse Database. |
| **Front End** | The web interface tool that users interact with directly to run report queries. |
| **Homepage** | The starting point for online analysis and user support of the SAM II Data Warehouse. The Homepage is also referred to as the SAM II Data Warehouse Main Page. |
| **Hyperlink** | Text or an object that opens a new web page when clicked. |
| **Intranet** | Private network protected behind a firewall. Not available for public use or access. |
| **Toolbar** | A set of tools that are available in the header area of the window when using the SAM II Data Warehouse. |



# ACCESSING THE SAM II DATA WAREHOUSE



SAM II Data Warehouse

**Welcome to the SAM II Data Warehouse**

Mainframe UserID: Password:

Login Clear

The SAM II Data Warehouse is designed as a centralized source of data to facilitate data analysis and report generation. The Data Warehouse promotes timeliness and the reduction of paper by allowing easy access to information through a Web Interface Tool or ad hoc reporting tools such as FOCUS.

This page begins the process of accessing the Web interface of the SAM II Data Warehouse. The Web interface formats SAM II information for quick and simple online analysis via Standard Reports (pre-defined FOCUS reports), Flexible Reports (flexible selection of data and output options) and Personal Reports (Flexible Reports saved under a User's ID).

To explore the benefits of the SAM II Data Warehouse Web interface, enter your authorized Mainframe User ID and Password. If you do not have an authorized Mainframe User ID, please contact your agency technical staff to request a Mainframe User ID.

# ACCESSING THE SAM II DATA WAREHOUSE

The SAM II Data Warehouse Welcome Page can only be accessed via the SAM II Intranet. The *Intranet* is a group of internal State of Missouri *Internet* sites. In order to access the Intranet, you will need an Internet browser application (such as Microsoft's Internet Explorer or Netscape Navigator) and you must be working from a computer on the Missouri State Wide Area Network (WAN).

To access the Welcome Page, enter the Intranet address provided in the Address field of the web browser*. The Welcome Page is the first screen to appear in order to gain Intranet access to the SAM II Data Warehouse. The Welcome Page gives a brief introduction of the SAM II Data Warehouse and the types of reports available for viewing or creating.

The Welcome Page is where you enter your Mainframe User ID and your password. To log into the Data Warehouse, follow the steps below:

**Step 1.** Enter your Mainframe User ID in the *Mainframe UserID* field.

**Step 2.** Press the TAB key on your keyboard to place the cursor in the *Password* field. Enter your password.

**Step 3.** Use your mouse to click on the **Login** button.

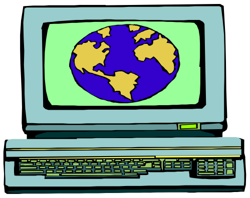
If you enter an incorrect User ID or password, click on the **Clear** button to blank out the information in the *Mainframe UserID* and *Password* fields.

**Note:** In the event that the User ID and/or password entered is invalid or expired, you will be alerted that the login information entered is invalid and prompted to retry the login or contact your System Administrator.

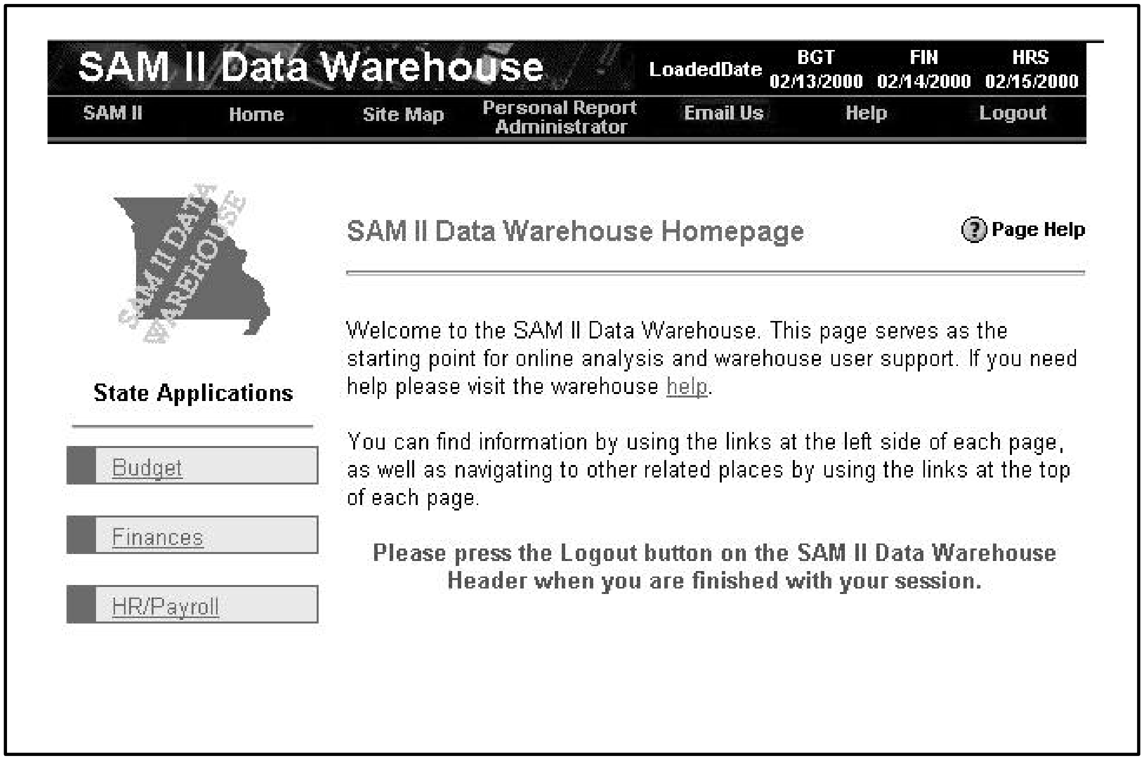
If a valid User ID is entered with an invalid password 3 times in a row, the mainframe User ID will be revoked. If this situation occurs, contact your System Administrator to have your ID reset.

*The address for the Production HR/Payroll Data Warehouse Web Interface is:

http://modata.intra.state.mo.us/dwprod/user/welcome.cfm



# SAM II DATA WAREHOUSE HOMEPAGE

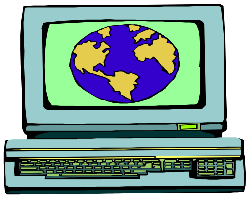


# SAM II DATA WAREHOUSE HOMEPAGE

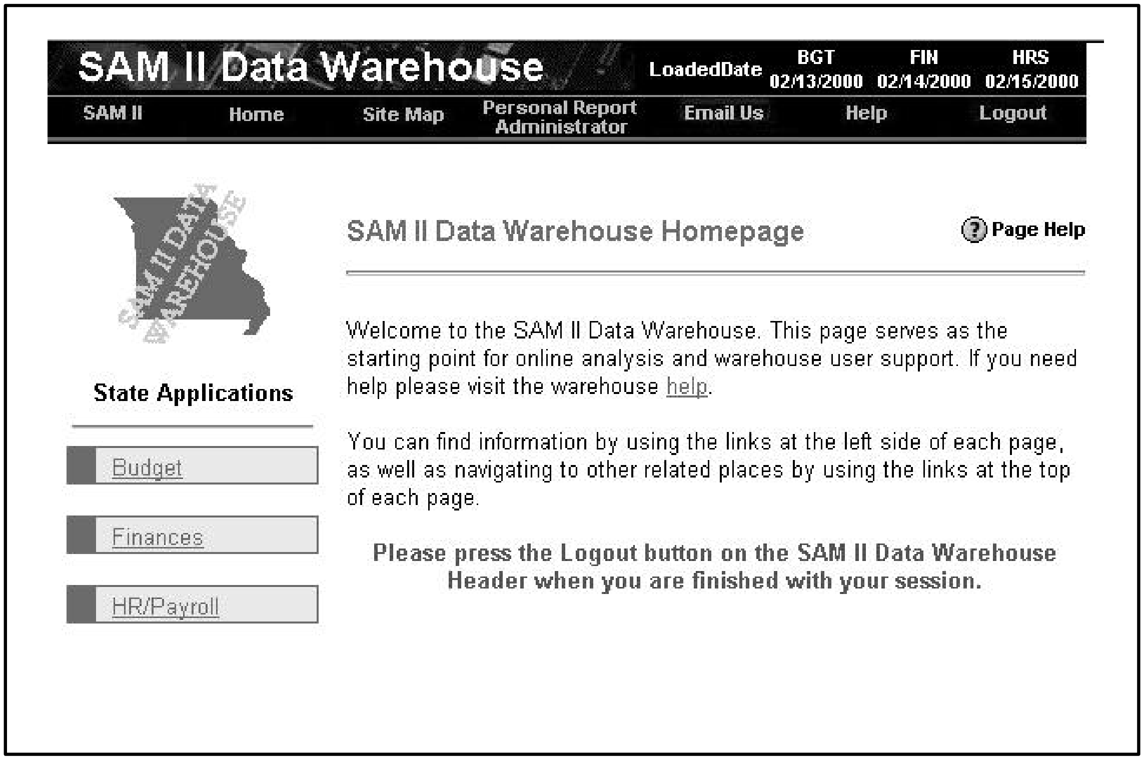
The SAM II Data Warehouse Homepage serves as the starting point for report viewing and creation. From the Homepage, users may access the Budget, Financial, or HR/Payroll Data Warehouses. To access each area, click on the appropriate link under the "State Applications" section on the Homepage.

The Data Warehouse performs an application check when any of the "State Application" links is clicked. If the HR/Payroll Data Warehouse is not available at the time you are logging in, the following message window will appear when the ***HR/Payroll*** link is clicked:


If you are not authorized to access the HR/Payroll Data Warehouse, the following message window will appear when the ***HR/Payroll*** link is clicked, with your user ID displayed:



# SAM II DATA WAREHOUSE HOMEPAGE AND TOOLBAR



# SAM II DATA WAREHOUSE HOMEPAGE AND TOOLBAR

The SAM II Data Warehouse Homepage serves as the starting point for report viewing and creation. From the Homepage, users may access the Budget, Financial, or HR/Payroll Data Warehouses. The Homepage is also the first place where users see the toolbar and the Page Help option. Both the toolbar and Page Help options are available on all pages in the SAM II Data Warehouse.

## TOOLBAR


The toolbar has the following options. Each one is explained on the following pages:

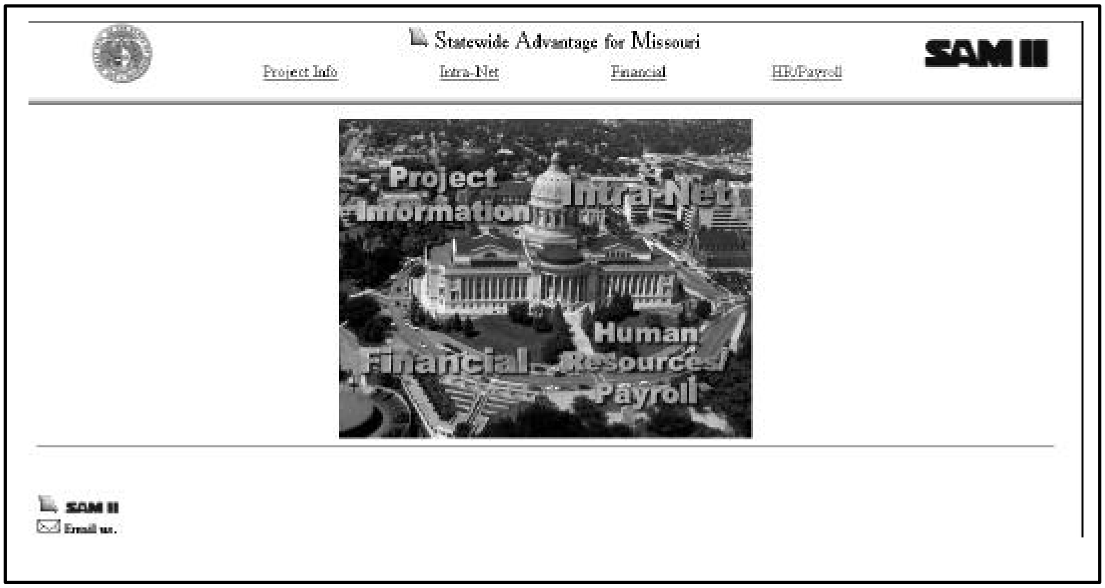
- SAM II
- Home
- Site Map
- Personal Report Administrator
- Email Us
- Help
- Logout

# NOTES

# SAM II DATA WAREHOUSE HOMEPAGE AND TOOLBAR

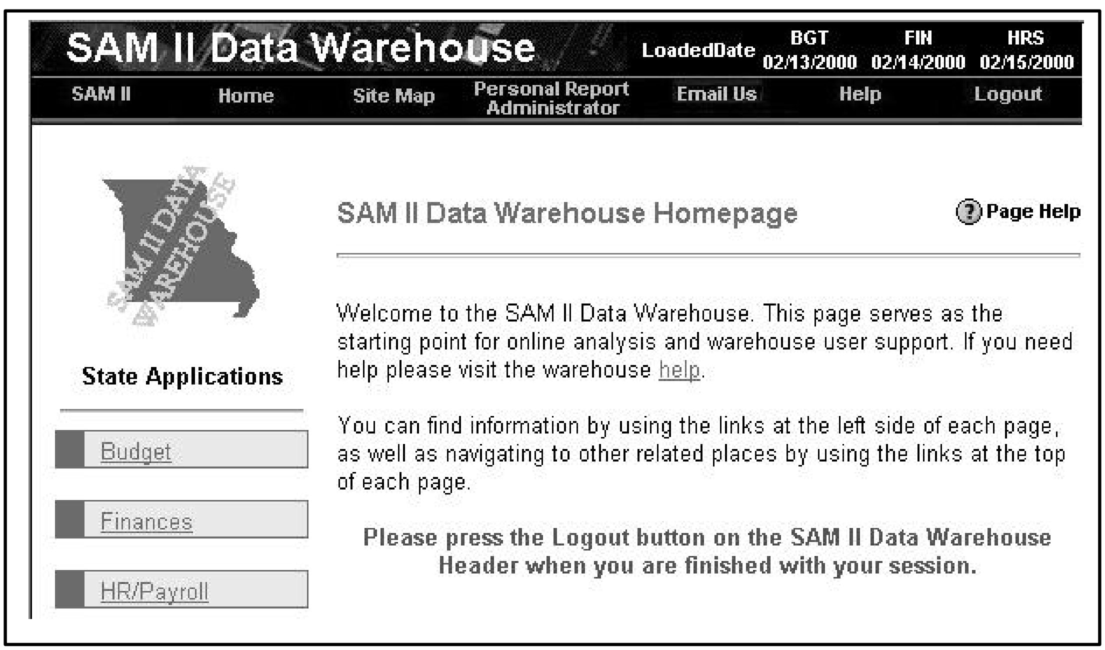
### SAM II

Clicking on the ***SAM II*** link sends the user to the SAM II Homepage. The SAM II Homepage provides links to current and progressive information about SAM II.




### HOME

Clicking on the ***Home*** link at any time sends the user to the SAM II Data Warehouse Homepage.



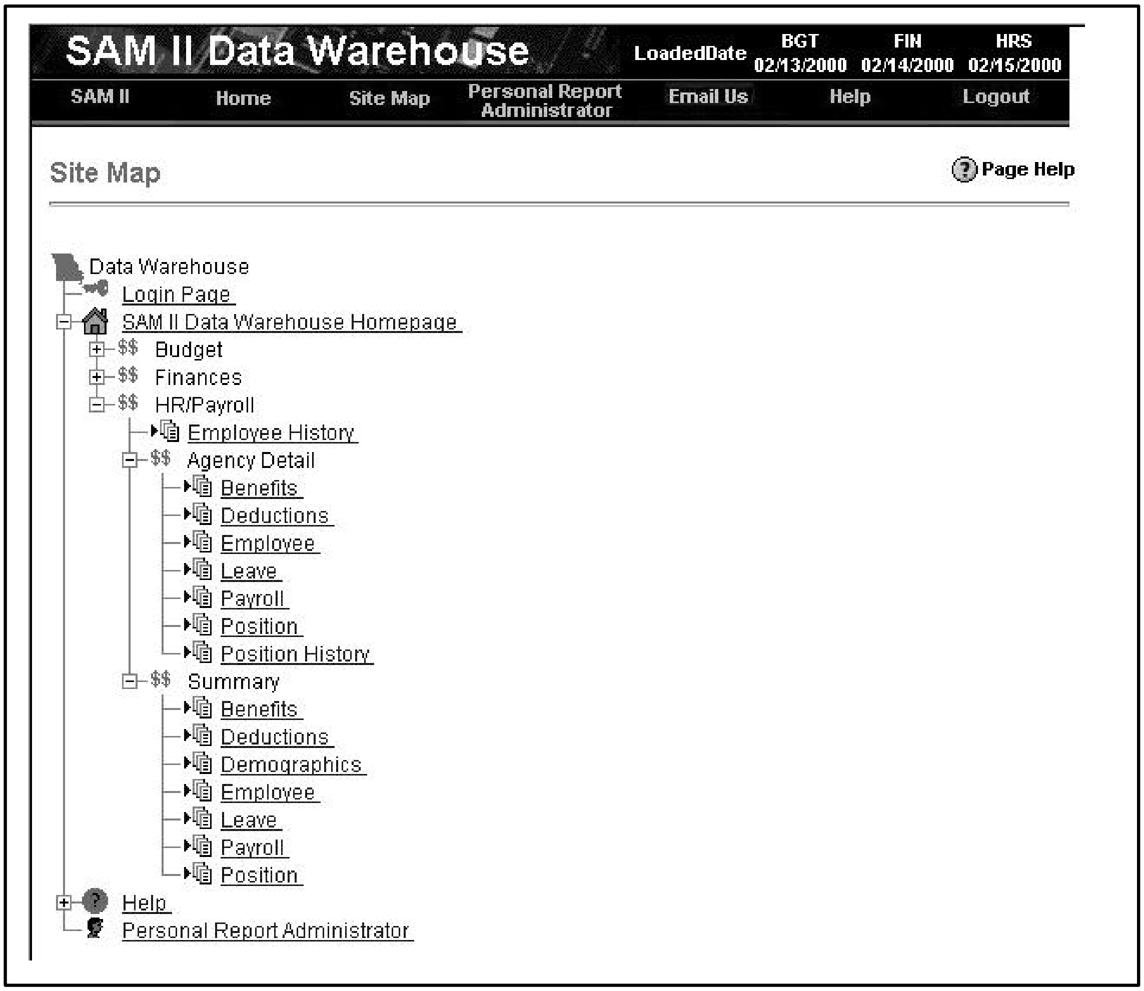
# NOTES

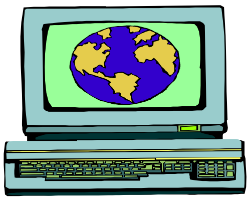
# SAM II DATA WAREHOUSE HOMEPAGE AND TOOLBAR

## SITE MAP

Clicking on the ***Site Map*** link takes the user to a site map page. The site map is an alternative path for accessing the features and functions of the SAM II Data Warehouse. It is set up as a directory of the hypertext links for accessing pages and reports in the SAM II Data Warehouse. If there is a plus sign to the left of a page name, the section can be expanded to display additional related data. The site map contains a link to every page within the SAM II Data Warehouse. Click on a link to access the page.

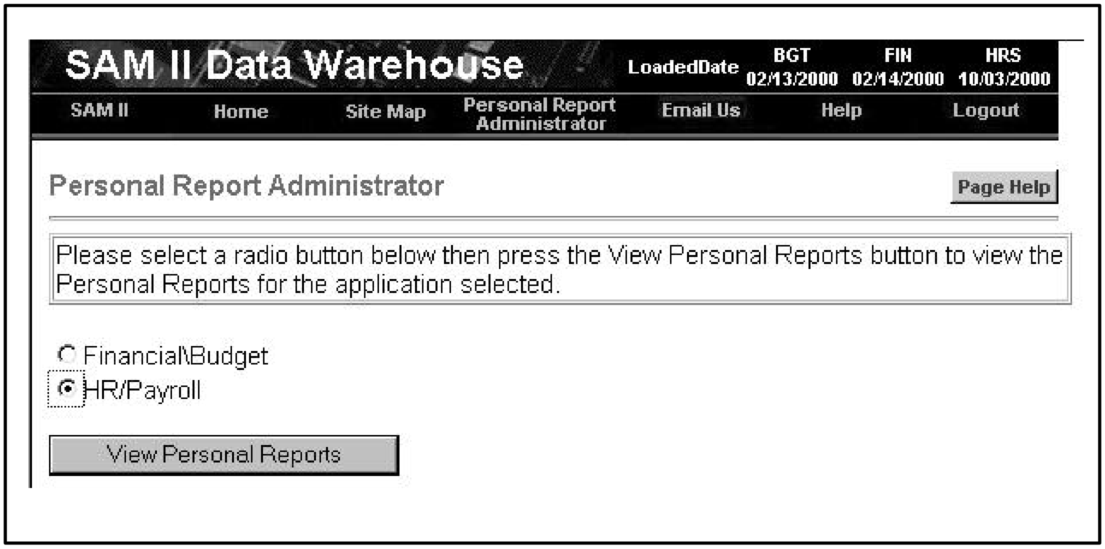
**Note:** The links on the site map page will not be displayed if the application is not up (i.e., if the SAM II HR/Payroll Data Warehouse is down, the site map links for the SAM II HR/Payroll Data Warehouse will not be displayed).





# SAM II DATA WAREHOUSE HOMEPAGE AND TOOLBAR

### PERSONAL REPORT ADMINISTRATOR



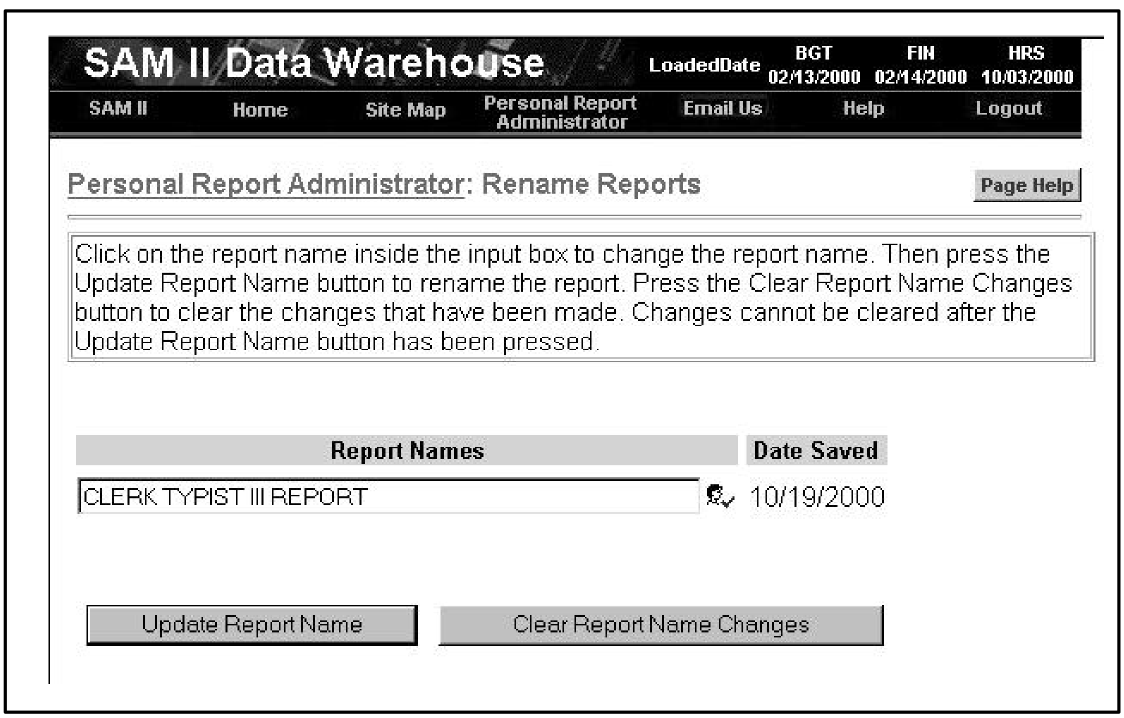

# SAM II DATA WAREHOUSE HOMEPAGE AND TOOLBAR

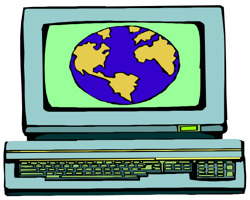
### PERSONAL REPORT ADMINISTRATOR

The Personal Report Administrator is used to retain personal reports created using a particular User ID. The initial Personal Report Administrator screen prompts you to choose between Financial/Budget reports and HR/Payroll reports. Select the appropriate radio button and click on the ***View Personal Reports*** button. A list of all personal reports created by your User ID will be displayed. The list will include the report name, the Area of Analysis used, and the date the report was last modified and saved.

**Note:** The radio buttons on the Personal Report Administrator page will not be displayed if the applications are not up (i.e., if the SAM II HR/Payroll Data Warehouse is down, the *HR/Payroll* radio button will not be displayed).

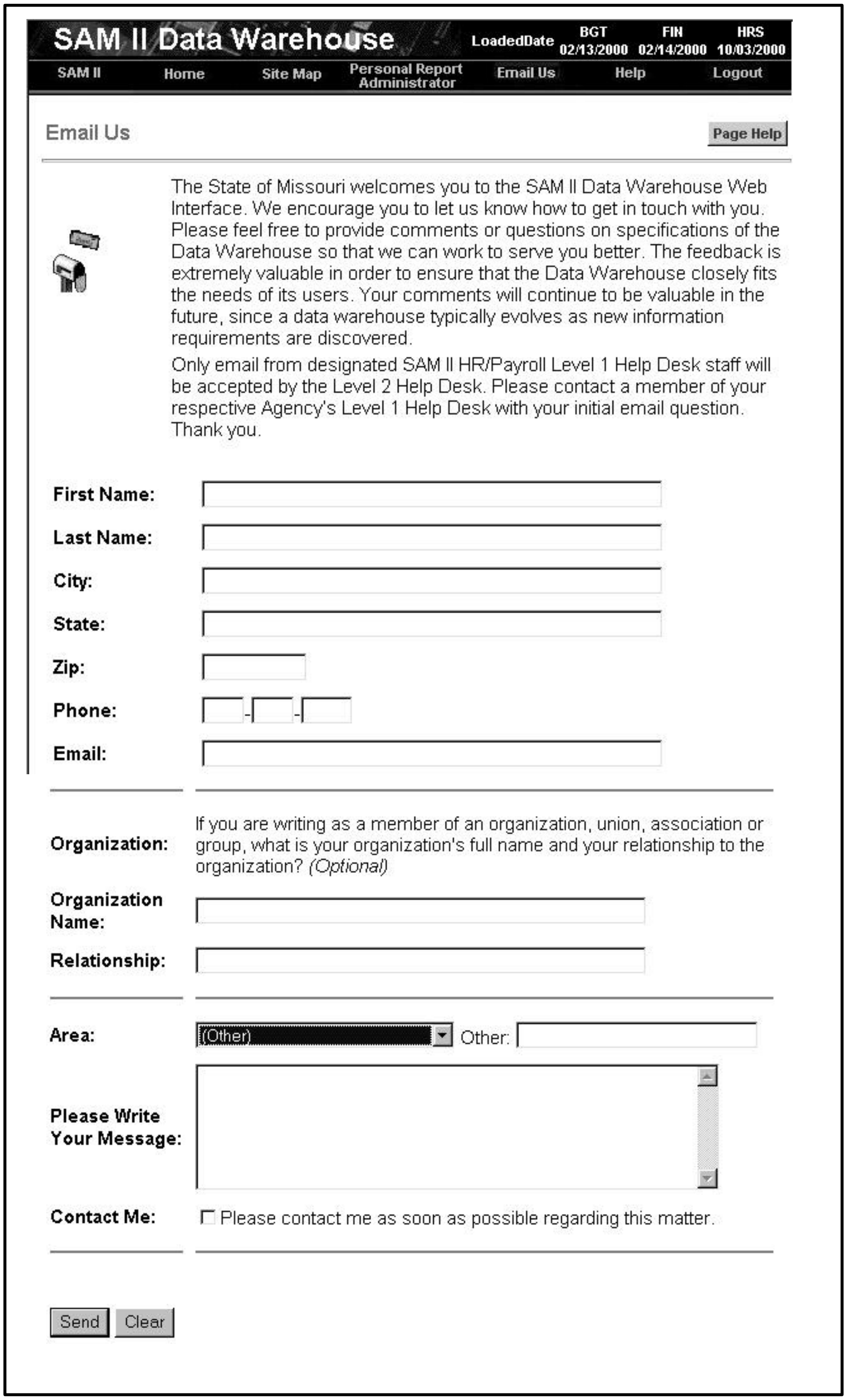
The Personal Report Administrator allows you to easily delete or rename personal reports. A report can be deleted or renamed by clicking in the small checkbox to the left of the report name and then clicking on the appropriate button below (either **Delete Report(s)** or **Rename Report(s)**). If renaming reports, you will be taken to the screen below. Type in the new name(s) in the *Report Names* field and click the ***Update Report Name*** button. Click the ***Clear Report Name Changes*** button to undo any changes.





# SAM II DATA WAREHOUSE HOMEPAGE AND TOOLBAR

## EMAIL US



SAM II Data Warehouse

| LoadedDate | BGT | FIN | HRS |
|---|---|---|---|
| | 02/13/2000 | 02/14/2000 | 10/03/2000 |

SAM II | Home | Site Map | Personal Report Administrator | Email Us | Help | Logout

Email Us

Page Help

The State of Missouri welcomes you to the SAM II Data Warehouse Web Interface. We encourage you to let us know how to get in touch with you. Please feel free to provide comments or questions on specifications of the Data Warehouse so that we can work to serve you better. The feedback is extremely valuable in order to ensure that the Data Warehouse closely fits the needs of its users. Your comments will continue to be valuable in the future, since a data warehouse typically evolves as new information requirements are discovered.

Only email from designated SAM II HR/Payroll Level 1 Help Desk staff will be accepted by the Level 2 Help Desk. Please contact a member of your respective Agency's Level 1 Help Desk with your initial email question. Thank you.

First Name:

Last Name:

City:

State:

Zip:

Phone: - -

Email:

Organization: If you are writing as a member of an organization, union, association or group, what is your organization's full name and your relationship to the organization? *(Optional)*

Organization Name:

Relationship:

Area: (Other) Other:

Please Write Your Message:

Contact Me: ☐ Please contact me as soon as possible regarding this matter.

Send Clear

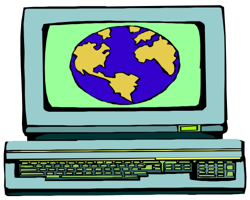
# SAM II DATA WAREHOUSE HOMEPAGE AND TOOLBAR

**EMAIL US**

Clicking on the ***Email Us*** link opens an online form users may use to send comments or questions regarding the SAM II Data Warehouse to the SAM II HR/Payroll Level 2 Help Desk. Note that only email from designated SAM II HR/Payroll Level 1 Help Desk staff will be accepted by the Level 2 Help Desk. You should contact your agency's Level 1 Help Desk initially with your question.

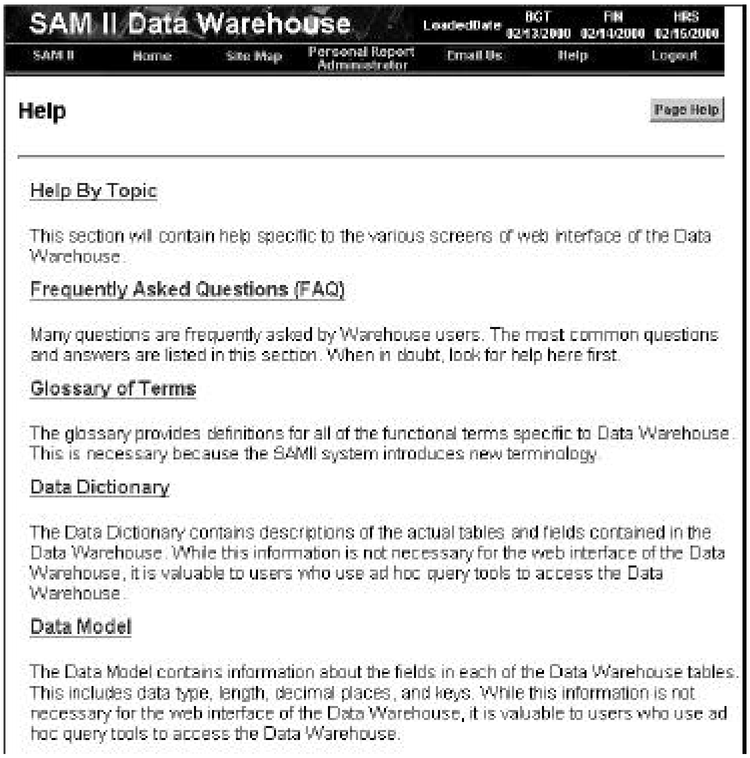
After authorized users have filled out the desired information on the form, they should click on the **Send** button. If successful, they will receive a message confirming that the email was sent. Click on **Clear** button to blank out the form.

**Note:** When sending email, be sure to specify the specific area of the Data Warehouse that is concerned, using the *Area* dropdown box on the form. Only email regarding HR/Payroll areas will go to the HR/Payroll Level 2 Help Desk.



# SAM II DATA WAREHOUSE HOMEPAGE AND TOOLBAR

## HELP



SAM II Data Warehouse

LoadedDate BGT 02/13/2000 FIN 02/14/2000 HRS 02/15/2000

SAM II | Home | Site Map | Personal Report Administrator | Email Us | Help | Logout

**Help**

Page Help

Help By Topic

This section will contain help specific to the various screens of web interface of the Data Warehouse.

Frequently Asked Questions (FAQ)

Many questions are frequently asked by Warehouse users. The most common questions and answers are listed in this section. When in doubt, look for help here first.

Glossary of Terms

The glossary provides definitions for all of the functional terms specific to Data Warehouse. This is necessary because the SAMII system introduces new terminology.

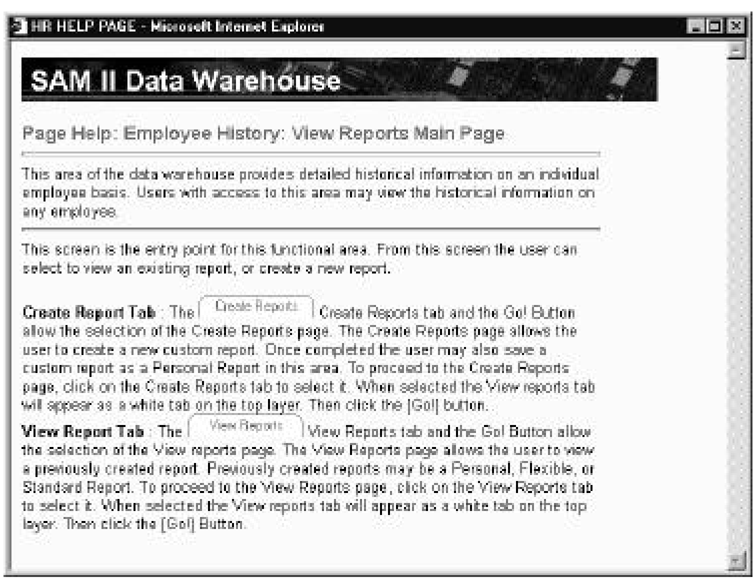
Data Dictionary

The Data Dictionary contains descriptions of the actual tables and fields contained in the Data Warehouse. While this information is not necessary for the web interface of the Data Warehouse, it is valuable to users who use ad hoc query tools to access the Data Warehouse.

Data Model

The Data Model contains information about the fields in each of the Data Warehouse tables. This includes data type, length, decimal places, and keys. While this information is not necessary for the web interface of the Data Warehouse, it is valuable to users who use ad hoc query tools to access the Data Warehouse.

## PAGE HELP



HR HELP PAGE - Microsoft Internet Explorer

SAM II Data Warehouse

Page Help: Employee History: View Reports Main Page

This area of the data warehouse provides detailed historical information on an individual employee basis. Users with access to this area may view the historical information on any employee.

This screen is the entry point for this functional area. From this screen the user can select to view an existing report, or create a new report.

**Create Report Tab** : The Create Reports Create Reports tab and the Go! Button allow the selection of the Create Reports page. The Create Reports page allows the user to create a new custom report. Once completed the user may also save a custom report as a Personal Report in this area. To proceed to the Create Reports page, click on the Create Reports tab to select it. When selected the View reports tab will appear as a white tab on the top layer. Then click the [Go!] button.

**View Report Tab** : The View Reports View Reports tab and the Go! Button allow the selection of the View reports page. The View Reports page allows the user to view a previously created report. Previously created reports may be a Personal, Flexible, or Standard Report. To proceed to the View Reports page, click on the View Reports tab to select it. When selected the View reports tab will appear as a white tab on the top layer. Then click the [Go!] Button.

# SAM II DATA WAREHOUSE HOMEPAGE AND TOOLBAR

### HELP AND PAGE HELP

Clicking on the ***Help*** link takes the user to the main Help page. The Help page is broken down into five sections:

- **Help By Topic** provides help related to a specific topic or keyword.
- **Frequently Asked Questions (FAQ)** displays the most common questions and answers asked by SAM II Data Warehouse users.
- **Glossary of Terms** provides definitions for several of the functional terms specific to the SAM II Data Warehouse.
- **Data Dictionary** contains descriptions of the tables and fields in the SAM II Data Warehouse. Although Web Interface users do not need this information, ad hoc (back end) users will find this valuable.
- **Data Model** contains technical information about the fields on each of the Data Warehouse tables, such as data type and field length. Although Web Interface users do not need this information, ad hoc (back end) users will find this valuable.

In addition to the main Help page, every page in the SAM II Data Warehouse also has a *Page Help* link.


The *Page Help* link takes the user to a help page containing information that is specific to the particular page they were on when they clicked the link.

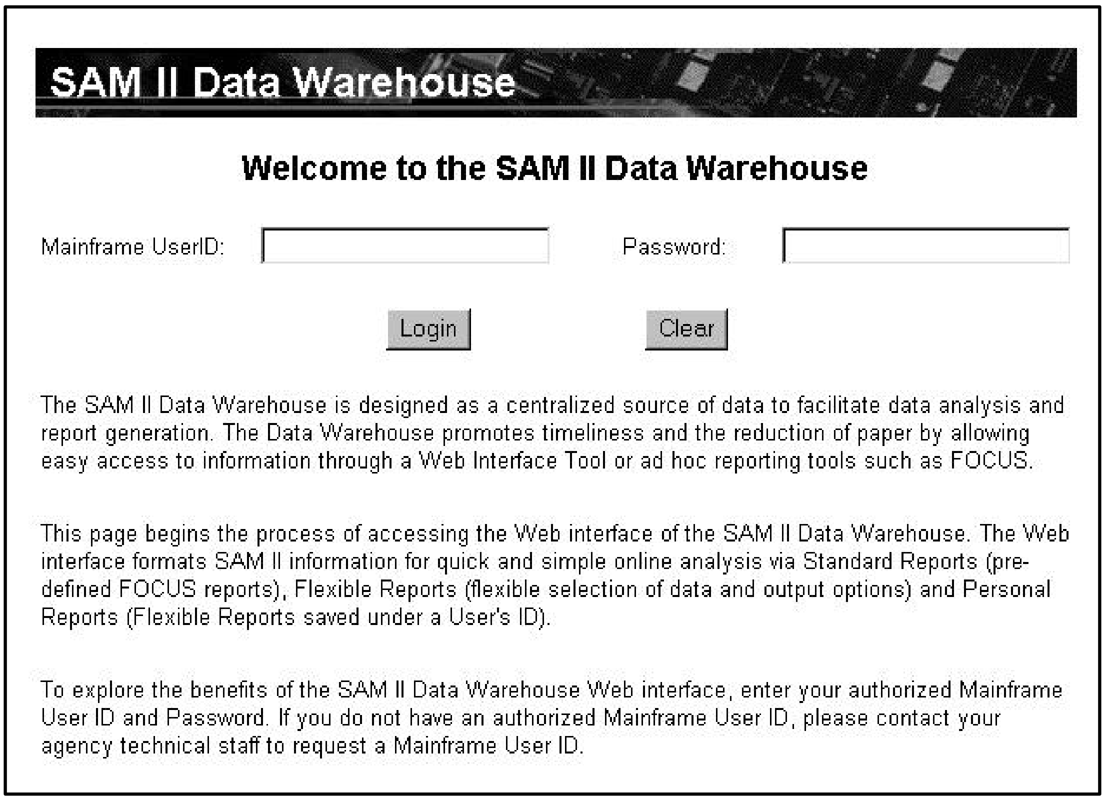
# NOTES

# SAM II DATA WAREHOUSE HOMEPAGE AND TOOLBAR

## LOGOUT

The ***Logout*** option allows users to exit from the SAM II Data Warehouse. By clicking on the ***Logout*** link from the toolbar, the Data Warehouse will close any pages you were working in and returns you to the Welcome Page. To log back in to the Data Warehouse, enter your mainframe User ID and password again.

**Note:** For security reasons, users should always log out of the Data Warehouse when finished working.



# NOTES

# TOPIC 3: CREATING, SAVING, AND VIEWING REPORTS

This topic will cover the skills necessary to create and save reports in the SAM II HR/Payroll Data Warehouse. Concepts in this section include data selection, viewing results, downloading data, saving reports, and viewing reports.

**Note:** This topic does not cover every reporting variable in the SAM II HR/Payroll Data Warehouse. What is presented is a clear and consistent set of guidelines to use when creating reports.

**After completing this topic, you will:**

- Understand how to select the appropriate data when creating reports.
- Understand how to control how the report data will be grouped and displayed.
- Understand how to view, download, and save report data.

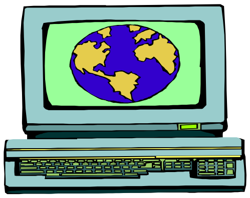
# NOTES

# TERMINOLOGY AND SECURITY

| | |
|---|---|
| **Check Box** | An option to turn a value on or off. Use the mouse to click on the check box to toggle the option on and off. |
| **Column Header** | The title of each column in a report. The titles are chosen from the display options selected. |
| **Data Selection** | The various data elements used to determine what data will be included in a report. |
| **Dropdown Box** | A box containing a list of values from which you may choose only one. A dropdown box can be identified by a small down arrow located on the right side of the box. |
| **Group By** | A query term that allows users to sort by a particular field. |
| **List Box** | A box containing a list of values where you may select more than one value if desired using the SHIFT and CTRL keys. |
| **Radio Button** | A feature that allows you to choose one available option from a selection list. |
| **Search Button** | An input box used to search for specific information by entering the first few characters of a given code or name. |

## SECURITY

Security in the SAM II HR/Payroll Data Warehouse Web Interface is controlled by agency. If a user has access to view information for an agency, the user has access to view information for all organizations within that agency. If reporting from one of the *Agency Detail* areas, the user is only able to see data for their agency. Data in the *Summary* areas is statewide. Users may choose to limit query results by an agency code in the *Summary* areas, but it is not mandatory. Users with RACF security for the *Employee History* area have access to view information on any employee, regardless of agency.



# AREA OF ANALYIS MAIN PAGE

HR/Payroll: Agency Detail Benefits Main Page

Page Help

View Reports | Create Reports

**Home Agency** 010 - LEGISLATURE-OPERATING Go!

Press the "Go !" button above to enter the View Reports section. From inside the View Reports section the user may select from a list of reports to view. The View Reports section contains the following report types:

Standard Reports - These reports are pre-defined FOCUS reports, which will be available to all users. These reports may be printed using the user's web browser print feature. These reports are not tagged with an icon.

Personal Reports - Reports created by the user using the Data Warehouse Web Interface Tool. They may be saved under a User's ID or downloaded as a Tab-Separated-Value (TSV) or a fixed width file. These reports are tagged with the Personal Report icon .

Flexible Reports - Reports created using the Data Warehouse Web Interface Tool. They may be downloaded as a Tab-Separated-Value (TSV) file, a fixed width file or printed using the user's web browser print feature. These reports are tagged with the Flexible Report icon .

HR/Payroll: Agency Detail Benefits Main Page

Page Help

View Reports | Create Reports

**Home Agency** 010 - LEGISLATURE-OPERATING Go!

Press the "Go!" button above to enter the Create Reports Main section. From inside the Create Reports section the user may select from the following sections:

**Data Selection Page**

**Date/GTN Selection Tab** - This tab allows the user to select pay period date(s) for the report.
**Home COA Selection Tab** - This tab allows the user to select home accounting report parameters.
**Title Selection Tab** - This tab allows the user to select title report parameters.
**Attributes Selection Tab** - This tab allows the user to select attribute report parameters specific to Benefits.
**Group By Selection Tab** - This tab allows the user to select a Group By (order used to sort records) option.

**Review Selections Page**

The Review Selections Page the code values for all the selections made on the Data Selection Tabs. This allows the user to quickly review their selections without moving through all the Data Selection Tabs.

**View Results Page**

The View Results Page allows users to see the results of the report requested. Users may download or save the report results.

The Create Reports section allows users to generate a limitless number of reports using the Data Selection, the Review Selections, and View results pages.

# AREA OF ANALYIS MAIN PAGE: CREATE REPORTS TAB

To access the SAM II HR/Payroll Data Warehouse Web Interface, click on the ***HR/Payroll*** link from the SAM II Data Warehouse Homepage. The HR/Payroll Areas of Analysis page will open.

The first step in creating or viewing a personal report is selecting an Area of Analysis. Clicking on any Area of Analysis link from the HR/Payroll Areas of Analysis page opens the Area of Analysis Main Page.

The Main Page of any Area of Analysis displays two tabs: the View Reports tab and the Create Reports tab. The View Reports tab will be covered later in this topic.

## CREATE REPORTS TAB

The Create Reports tab on the Area of Analysis Main Page is the starting point for creating personal reports. This tab includes a brief summary of each of the various options users will be presented with when creating reports. In addition, if the Area of Analysis selected is from the *Agency Detail* group (or the *Summary Payroll* area), the user will select the appropriate agency from the available *Agency* dropdown box. The user must have security clearance for the agency selected. The selected agency will also determine the organization choices available during Data Selection.

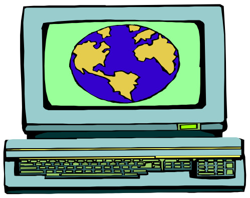
**Note:** When working in the *Agency Detail Payroll* or *Summary Payroll* Areas of Analysis, the user must select either the **Home** or **Charged** radio button to indicate what type of agency is selected in the *Agency* dropdown box.

After selecting the correct agency (if necessary), click on the ***Go!*** button 

to begin report creation. The ***Go!*** link takes the user to the first report creation page. The following four main options are available from the report creation pages of all of the Areas of Analysis except the *Employee History*, *Agency Detail Payroll Accounting* and *Agency Detail Position History* areas: *

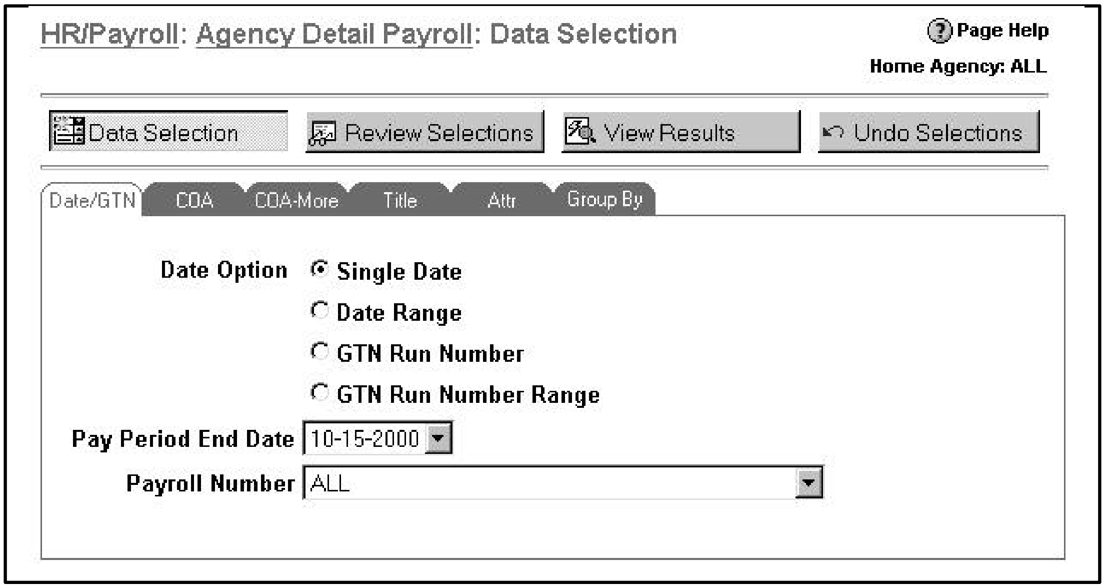
- Data Selection
- Review Selections
- View Results
- Undo Selections

*The *Employee History* area does not include the "Review Selections" option, because all of the selection criteria are displayed under the "Data Selection" option. The options available for the *Agency Detail Position History* and *Agency Detail Payroll Accounting* areas are discussed in the appendices at the back of this manual.

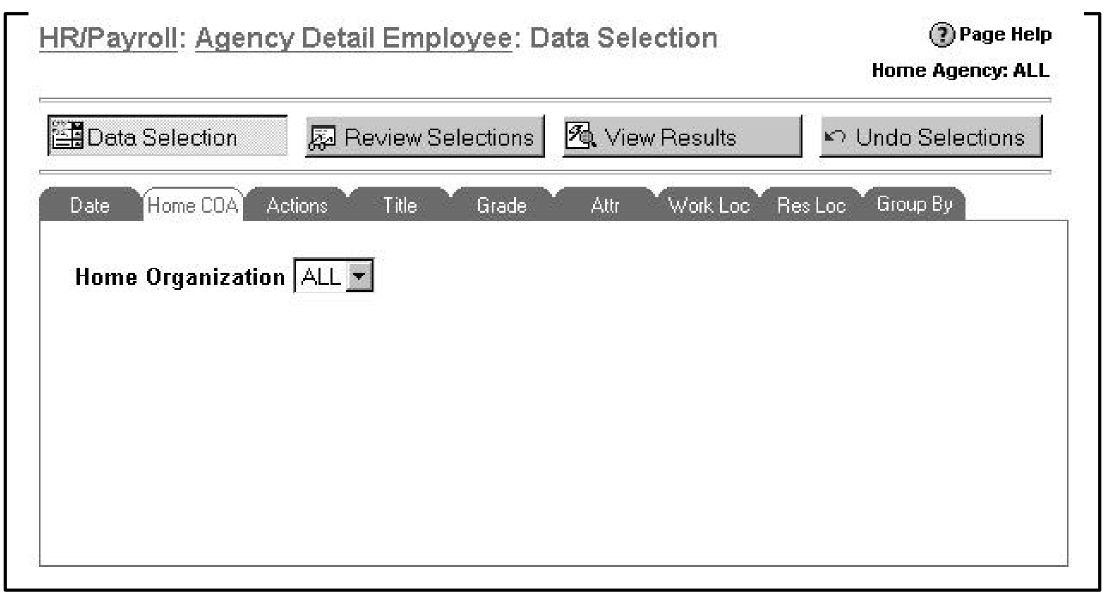


# REPORT CREATION PAGES: DATA SELECTION

## DATE/GTN




## HOME COA



# REPORT CREATION PAGES: DATA SELECTION

Clicking the **Data Selection** button opens the Data Selection page. The Data Selection page is used to define and specify what types of data will be displayed in the report. The Data Selection page for each Area of Analysis includes one or more selection tabs used to organize the different types of selection criteria. Although the selection tabs available vary for each Area of Analysis, the tabs discussed below are the most common. Refer to the appendix at the back of this manual for listings of the actual selection tabs available for each Area of Analysis.

## SEARCH BUTTONS


Many selection tabs in the Data Selection pages offer **Search** buttons. **Search** buttons can be used to find valid values for the fields they appear next to. To search for valid values, click on the **Search** button. Follow the instructions on the Search page to find a list of valid values. Click on a value in the list to select it and return to the Data Selection page.

## DATE/GTN AND DATE SELECTION TABS

**Date/GTN** selection tabs are used to select single dates, date ranges, Gross-to-Net (GTN) run numbers, or GTN run number ranges to include in the report. Single dates and date ranges are based on pay period end dates. Selecting a radio button from the *Date Option* choices determines the remaining fields available—for example, if "Date Range" is selected, *Pay Period Start Date* and a *Pay Period End Date* fields are displayed.

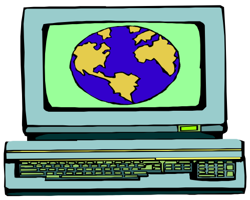
**Date** selection tabs do not include GTN run number or pay period information. Date selection tabs in employee areas are used to select a date range, up to one year, to be included in the report. Date selection tabs in position and demographic areas are used to select a single "as of" date to be included in the report.

**Note:** If a date range that includes multiple fiscal years has been specified on the Date/GTN or Date selection tabs, all Chart of Account codes except *Agency* will be set to "ALL."

## HOME COA AND POSN COA SELECTION TABS

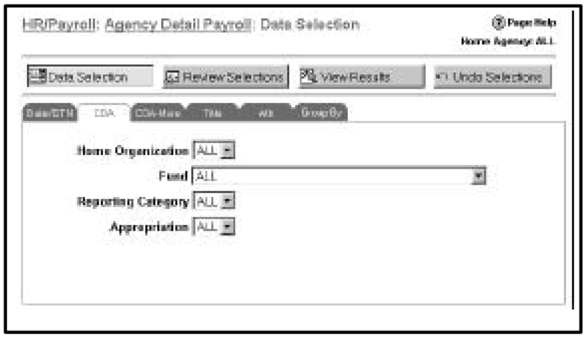
**Home COA** selection tabs are used to limit the data included in the report by agency and/or organization.

**Posn COA** selection tabs are also used to limit the data included in the report by agency and/or organization. In addition, Posn COA selection tabs can be used to specify a particular labor distribution profile within an agency and/or organization.

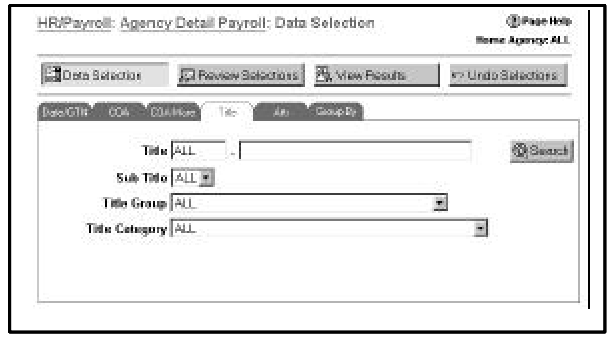


# REPORT CREATION PAGES: DATA SELECTION

## COA

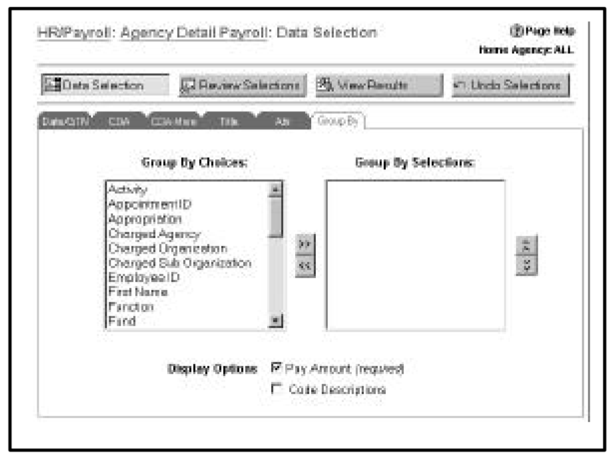



## TITLE




## ATTR


## GROUP BY



# REPORT CREATION PAGES: DATA SELECTION

### COA AND COA-MORE SELECTION TABS

**COA** selection tabs are used to limit the data included in the report by what Chart of Account elements were charged (Agency, Organization, Fund, etc.). **COA-More** selection tabs are used in the same way as COA selection tabs. They display additional Chart of Account options. These tabs are only available in the *Agency Detail Payroll* and *Summary Payroll* Areas of Analysis. Actual field names on these selection tabs will differ depending on whether the **Home** or **Charged** radio button was selected on the Create Reports tab.

### TITLE SELECTION TABS

**Title** selection tabs are used to limit the data included in the report by title information. If a title code is selected in the *Title* field, valid sub title codes will be available in the *Sub Title* dropdown box. Report data can also be limited by *Title Group* and *Title Category*.

### ATTR SELECTION TABS

**Attr** selection tabs are used to limit the data included in the report by various area-specific attributes. For example, the Attr selection tab on the *Summary Payroll* Data Selection page includes payroll-related criteria options such as *Pay Event Category* and *Pay Class*.

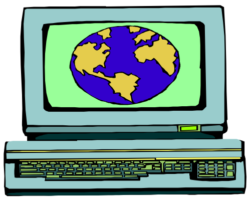
### GROUP BY SELECTION TABS

**Group By** selection tabs are used to specify what fields will be displayed on the report and as well as how the data on the report will be sorted. To select a field to include on the report, highlight it from the “Group By Choices:” list on left and click on the right arrow button. Selected choices appear in the “Group By Selections” list. To remove a selected choice, highlight it from the “Group By Selections” list and click on the left arrow button. Use the SHIFT and CTRL keys to select multiple fields at one time from the “Group By” lists.

The report will be sorted in the order of the fields displayed in the “Group By Selections” list. To change the order of the list, highlight a field and click on the up or down arrow buttons to move the field higher or lower in the sort order.

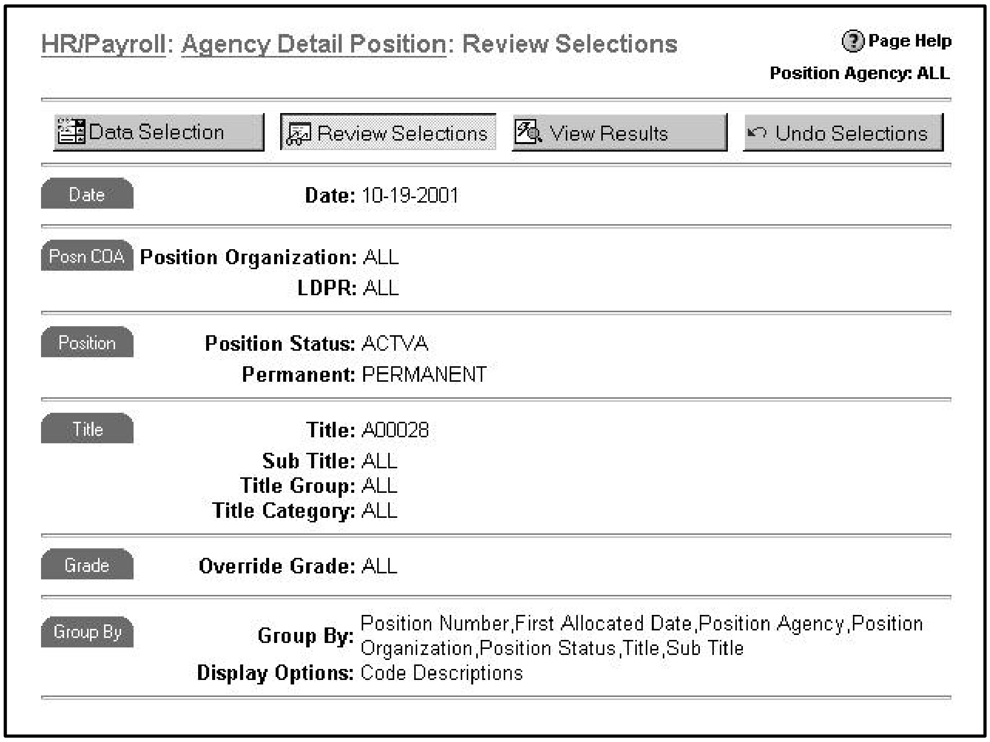
**Note:** If using Internet Explorer 5.0, external browser errors will be returned if you select more than 10 items to group by.

Group By selection tabs also have *Display Options* checkboxes. Use these checkboxes to include additional fields on the report. Some *Display Options* checkboxes are always checked.

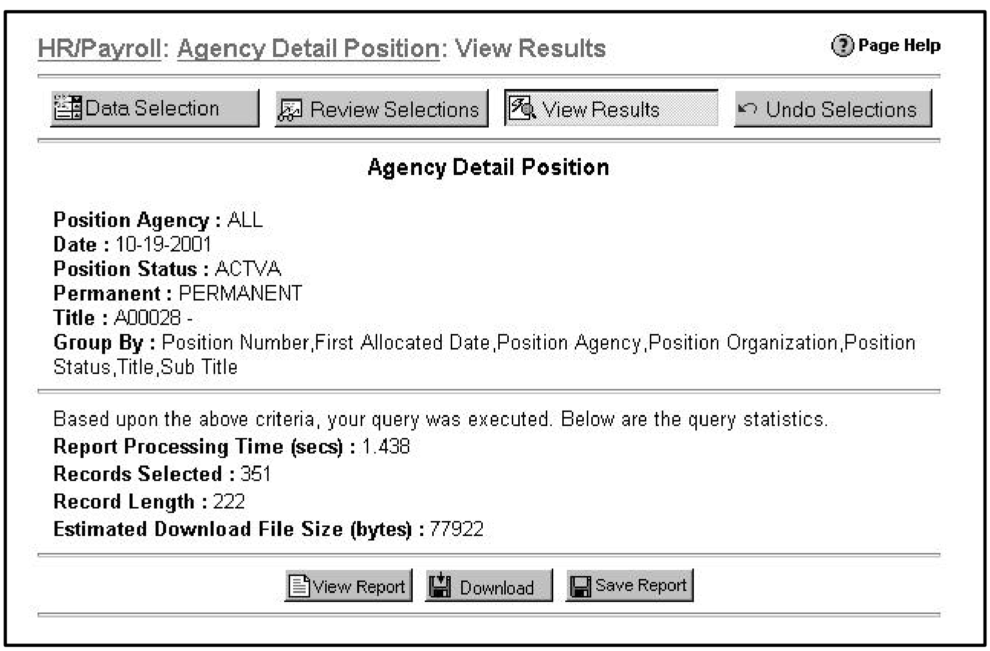


# REPORT CREATION PAGES: REVIEW SELECTIONS, UNDO SELECTIONS, AND VIEW RESULTS

## REVIEW SELECTIONS




## VIEW RESULTS



# REPORT CREATION PAGES: REVIEW SELECTIONS, UNDO SELECTIONS, AND VIEW RESULTS

## REVIEW SELECTIONS

Clicking the **Review Selections** button opens the Review Selections page. The Review Selections page allows the user to review the criteria selected on the Data Selection page without clicking between tabs. Report criteria should always be reviewed prior to executing the report query. When reviewing the report's criteria, users can find errors and use the hyperlinks to return to the appropriate Data Selections area to correct them. Avoiding errors in reporting criteria will reduce the number of queries executed with incorrect results, therefore lower reporting costs.

## UNDO SELECTIONS

Clicking on the **Undo Selections** button returns the user to the Area of Analysis Main Page, and resets the criteria selected on the Data Selection page.

## VIEW RESULTS

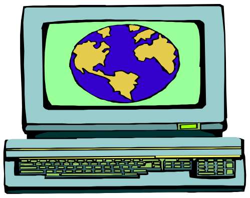
Clicking on the **View Results** button runs the query based on the selection criteria and opens the View Results page. The View Results page shows the selection criteria and statistics for the query that was just executed. From this page users may view the generated report online, download it, or save the report design as a Personal Report.

**Note:** When using any of the *Summary* Areas of Analysis, the value in the *Records Selected* field on the View Results page represents the number of different combinations that met your query's criteria. You should view the report to be sure of the data returned. For example, assume an agency has the following:

Agency: ***300***, Pos #: ***0000123***, Title: ***ABCD00***, Sub-Title: ***A1***
Agency: ***300***, Pos #: ***0000456***, Title: ***ABCD00***, Sub-Title: ***A1***
Agency: ***300***, Pos #: ***0000789***, Title: ***ABCD00***, Sub-Title: ***A2***

A query for Agency 300 and Title ABCD00, grouped by agency and title, would "select" 1 record—one line with a count of 3 positions. A query for Agency 300 and Title ABCD00, grouped by agency, title, and sub-title would "select" 2 records—one line with a count of 1 position and one line with a count of 2 positions.

**Note:** When viewing results of a query, a value of ***M*** in the *Appointment ID* field for an employee denotes that the data returned is from the employee's (pre-SAM II) MESH record.



# VIEW RESULTS: VIEW REPORT

HR/Payroll: Agency Detail Position: View Report | Page Help

Data Selection | Review Selections | View Results | Undo Selections

**Agency Detail Position**

**Position Agency :** ALL
**Date :** 10-19-2001
**Position Status :** ACTVA
**Permanent :** PERMANENT
**Title :** A00028 -
**Group By :** Position Number,First Allocated Date,Position Agency,Position Organization,Position Status,Title,Sub Title

Go To Row # 1 | Rows/Page 20 | 1 - 20 of 351

| Position Number | First Allocated Date | Position Agency | Position Organization | Position Status | Title | Sub Title |
|---|---|---|---|---|---|---|
| IN5W001 | 04-17-2000 | 010 | 2025 | ACTVA | A00028 | A1 |
| SP7W001 | 04-01-2000 | 010 | 2018 | ACTVA | A00028 | A1 |
| SP7W002 | 04-01-2000 | 010 | 2018 | ACTVA | A00028 | A1 |
| SP7W003 | 04-01-2000 | 010 | 2018 | ACTVA | A00028 | A1 |
| SP7W004 | 04-01-2000 | 010 | 2018 | ACTVA | A00028 | A1 |
| SP7W005 | 04-01-2000 | 010 | 2018 | ACTVA | A00028 | A1 |
| SP7W006 | 04-01-2000 | 010 | 2018 | ACTVA | A00028 | A1 |
| SP7W007 | 04-01-2000 | 010 | 2018 | ACTVA | A00028 | A1 |
| SP7W008 | 04-01-2000 | 010 | 2018 | ACTVA | A00028 | A1 |
| SP7W009 | 04-01-2000 | 010 | 2018 | ACTVA | A00028 | A1 |
| SP7W010 | 04-01-2000 | 010 | 2018 | ACTVA | A00028 | A1 |
| SP7W011 | 04-01-2000 | 010 | 2018 | ACTVA | A00028 | A1 |
| SP7W012 | 04-01-2000 | 010 | 2018 | ACTVA | A00028 | A1 |
| SP7W013 | 04-01-2000 | 010 | 2018 | ACTVA | A00028 | A1 |
| SP7W014 | 04-01-2000 | 010 | 2018 | ACTVA | A00028 | A1 |
| SP7W015 | 04-01-2000 | 010 | 2018 | ACTVA | A00028 | A1 |
| SP7W016 | 04-01-2000 | 010 | 2018 | ACTVA | A00028 | A1 |
| SP7W017 | 04-01-2000 | 010 | 2018 | ACTVA | A00028 | A1 |
| SP7W018 | 04-01-2000 | 010 | 2018 | ACTVA | A00028 | A1 |
| SP7W019 | 04-01-2000 | 010 | 2018 | ACTVA | A00028 | A1 |

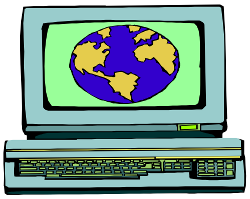
# VIEW RESULTS: VIEW REPORT

Once the query has been executed, users are offered three options for accessing the generated report: view the report online, download the report, and save the report as a Personal Report. If the query was successful, a button associated with each option appears on the View Results page.

### VIEW REPORT

Clicking on the **View Report** button opens the View Report page. On this page, users can view the results of the query online in report format. The View Report page also offers buttons that allow users to go to a specific row on the report or change the number of rows that appear on each page. To use these features, type the desired number in the field next to the appropriate button, then click the button. Use the left and right arrow buttons to move between pages.

**Note:** When printing reports it is suggested that users first download the report onto their PC (see below), rather than printing from the View Report page. Using the print command from the web browser will only print what is shown on the screen. For example, if your generated report has 200 rows and only 20 rows are displayed on the screen, you would have to execute the print command 10 times (once for each page) to print all of the data. If the report is downloaded, the entire document can be printed.



# VIEW RESULTS: DOWNLOAD REPORT

## HR/Payroll: Download

Page Help

**Download Options**

- Tab-Separated
- Fixed Width
- Cancel

Clicking on the Download Option bars to the left will create files that can be downloaded with results from a query. They can then be imported into a database or a spreadsheet. Note that the download file will contain the entire results of the query, and not just the 20 records displayed. Clicking on the cancel button will return to the View Results page.

The file that will be downloaded will be a generic format. Tab Separated Values (.TSV) formats the data, with each field separated by a TAB. This format can be read by most major spreadsheets and database applications, including MS Access and MS Excel. Most Internet browsers will handle a link to a file of this type correctly, but some browsers may need to have their configuration adjusted. A default file name has been give to each report created. The default file name can be changed when the report is downloaded.

Text (.TXT) files are simply ASCII Text files. These files may be opened with any text viewer (such as NotePad, or MS Word.) Fixed Width Data stored in a .TXT file can be imported directly into many major applications, including MS Excel and MS Access. Use the information in the Report Heading and Record Layout File to help configure this import.

Click on one of the links to the left to create either a Tab Separated Values (.TSV) File, or a Fixed Width (.TXT) file. It will take several seconds for the Data Warehouse Server to prepare your files after you click the button. When the server is finished, links will be provided to download the files.

# VIEW RESULTS: DOWNLOAD REPORT

**DOWNLOAD REPORT**

Clicking on the **Download** button opens the Download page. This page allows users to download all of the data returned from the query to a local computer. Downloading reports can be helpful, as the data can be imported into a spreadsheet for further manipulation.

Data can be downloaded from the SAM II HR/Payroll Data Warehouse in two different formats: Tab-Separated Value files (.TSV) and Fixed Width files (.TXT).

Tab-Separated Values (.TSV) files format the data with each field separated by a TAB. This format includes the report title, column headers, and the report data. .TSV files can be read by most major spreadsheet and database applications.

**Note:** If downloading .TSV files using Internet Explorer 5.0 *and* Windows 95, you must download the file using the default file name. You may rename the file later.

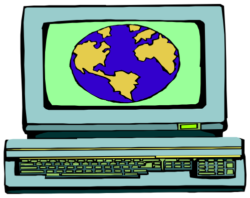
**Note:** If you are having trouble downloading .TSV files, refer to the "Help by Topic" section of the main Data Warehouse Help window. Search by keyword "download".

Fixed Width (.TXT) files are straight sequential files in ASCII format. If downloading into this format, the user will download two separate .TXT files. One file contains the report data, and the second file contains the column headers (field names). Any text viewer (such as Notepad or MS Word) and most spreadsheet/database applications can open .TXT files.

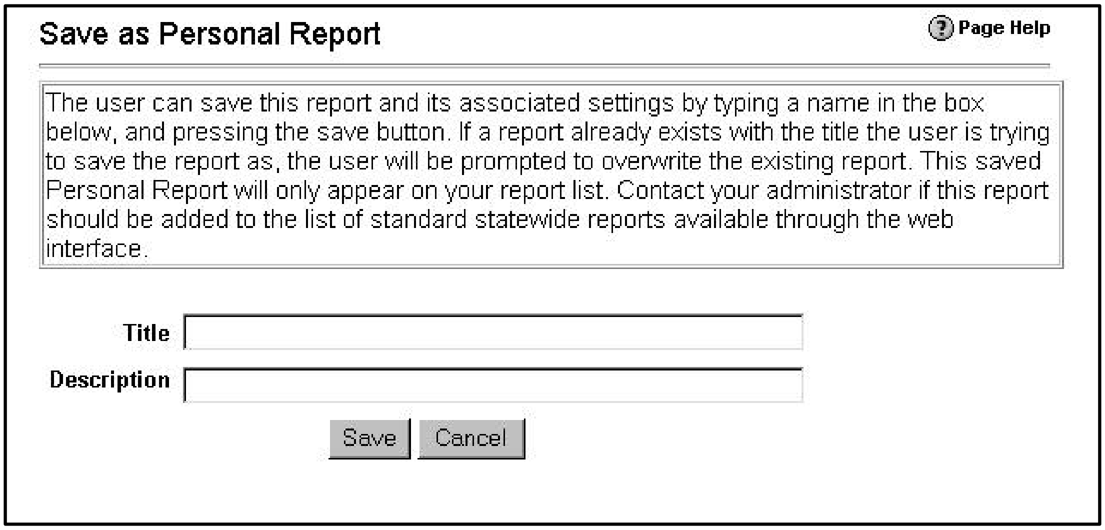
**Note:** MS Access does not recognize the .TSV extension. If using MS Access the .TXT download option should be used. If a .TSV file must be used with MS Access, one of the following actions can be taken: 1) Open the .TSV file with MS Excel, delete the report title and column headers, save the file as a .TXT file, and open the .TXT file in MS Access. 2) Rename the downloaded .TSV file to a .TXT file, open the file in Notepad, delete the report title and column headers and save. Open the .TXT file with MS Access.

To download data, click on the appropriate file format link on the left side of the Download page. The next page that opens will contain links to the downloadable file(s). Follow the instructions on the page to download the file(s) to your PC.

**Note:** Click the ***Cancel*** link from the Download page to return to the View Results main page.



# VIEW RESULTS: SAVE REPORT



Save as Personal Report

Page Help

The user can save this report and its associated settings by typing a name in the box below, and pressing the save button. If a report already exists with the title the user is trying to save the report as, the user will be prompted to overwrite the existing report. This saved Personal Report will only appear on your report list. Contact your administrator if this report should be added to the list of standard statewide reports available through the web interface.

Title

Description

Save Cancel

# VIEW RESULTS: SAVE REPORT

**SAVE REPORT**

Clicking on the **Save Report** button opens the Save as Personal Report page. This page allows users to save the design of the report as a Personal Report, to be accessed later through the Personal Report Administrator.

To save your report, enter a title for the report in the *Title* field, and a short description of the report in the *Description* field. When satisfied with the report title and description, click the **Save** button. You will be taken to the main View Reports page, Personal tab. On this tab you will see the report you just saved. Place the mouse pointer over the Description icon for a description of the report. Deleting and renaming reports must be done using the Personal Report Administrator (see Topic 2). Note that all Flexible Reports must first be saved as Personal Reports.

**Note:** Click the **Cancel** button from the Save Report page to return to the View Results main page.

**CREATING A FLEXIBLE REPORT FROM A PERSONAL REPORT**

Any Personal Report can be made into a Flexible Report. Unlike Personal Reports, Flexible Reports are available to any web interface user who is authorized for the agency that created the Flexible Report. Personal Reports are only available to the user who created the report. Flexible Reports should be created from any Personal Reports deemed useful to other users.

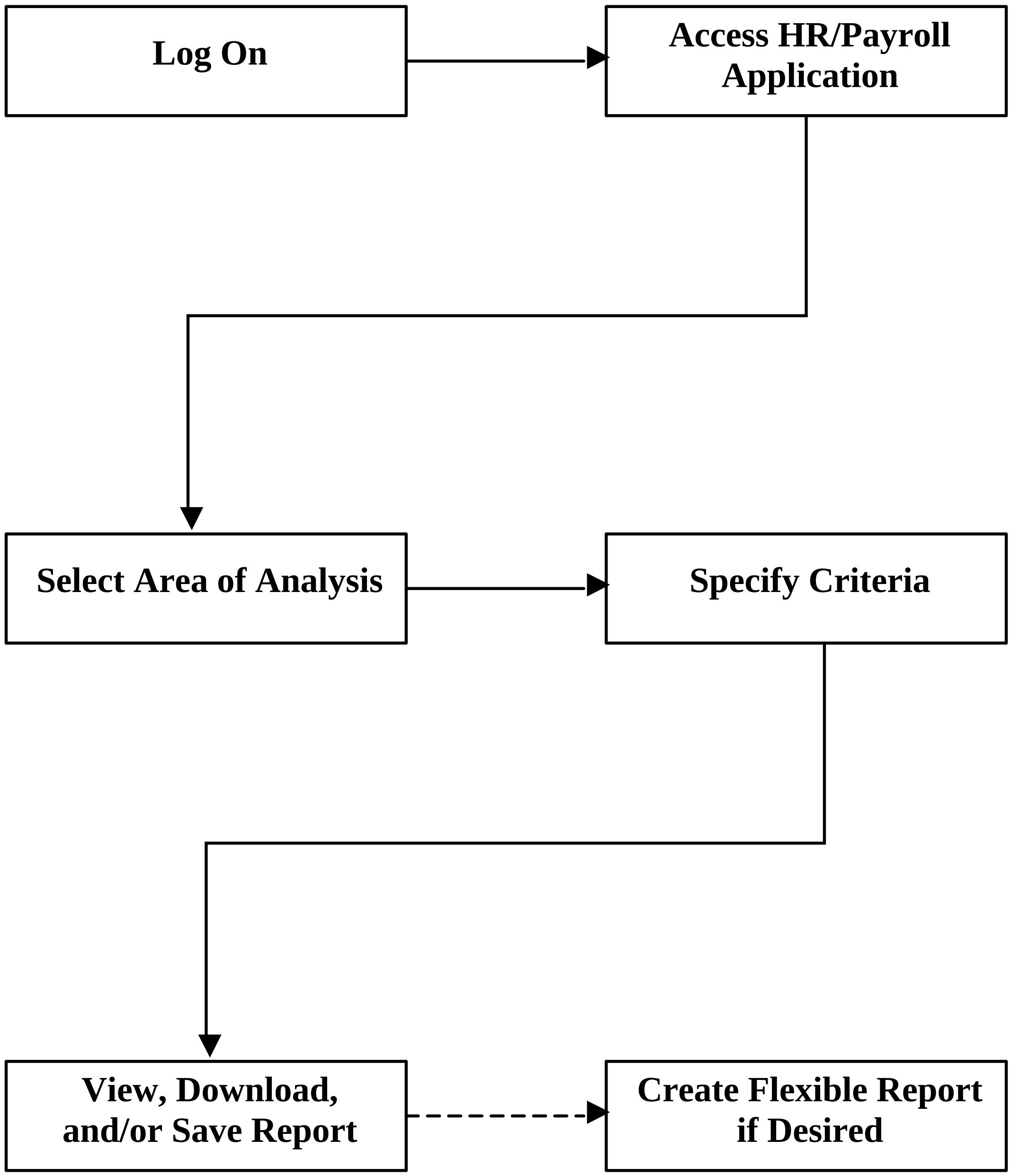
To create a Flexible Report, contact your agency's SAM II HR/Payroll Level 1 Help Desk. You will be asked to provide the following information:

- User ID used to create the Personal Report
- Exact title of the Personal Report
- Application in which the Personal Report was created (i.e., HR/Payroll, Budget, or Financial)
- Area of Analysis the Personal Report was created in

In addition, you may be asked for a new title and/or description for the Flexible Report, and whether or not you would like to keep your Personal Report.

The agency Level 1 Help Desk staff will complete the processing required and forward the request to the SAM II HR/Payroll Level 2 Help Desk to create the Flexible Report.

# CREATING REPORTS: SUMMARY OF STEPS



# CREATING REPORTS: SUMMARY OF STEPS

The basic steps for creating reports from the SAM II HR/Payroll Data Warehouse Web Interface are below.

**Step 1.** Log into the Data Warehouse from the Welcome Page.

**Step 2.** Select the ***HR/Payroll*** link from the State Applications list.

**Step 3.** Select the appropriate Area of Analysis.

**Step 4.** Click on the Create Reports tab, select your agency from the dropdown box, and click the ***Go!*** button.

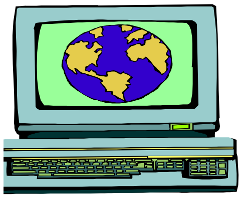
**Step 5.** Use the various tabs on the Data Selection pages to specify criteria to limit your query.

**Step 6.** Use the Review Selections page to review and edit your criteria if necessary.

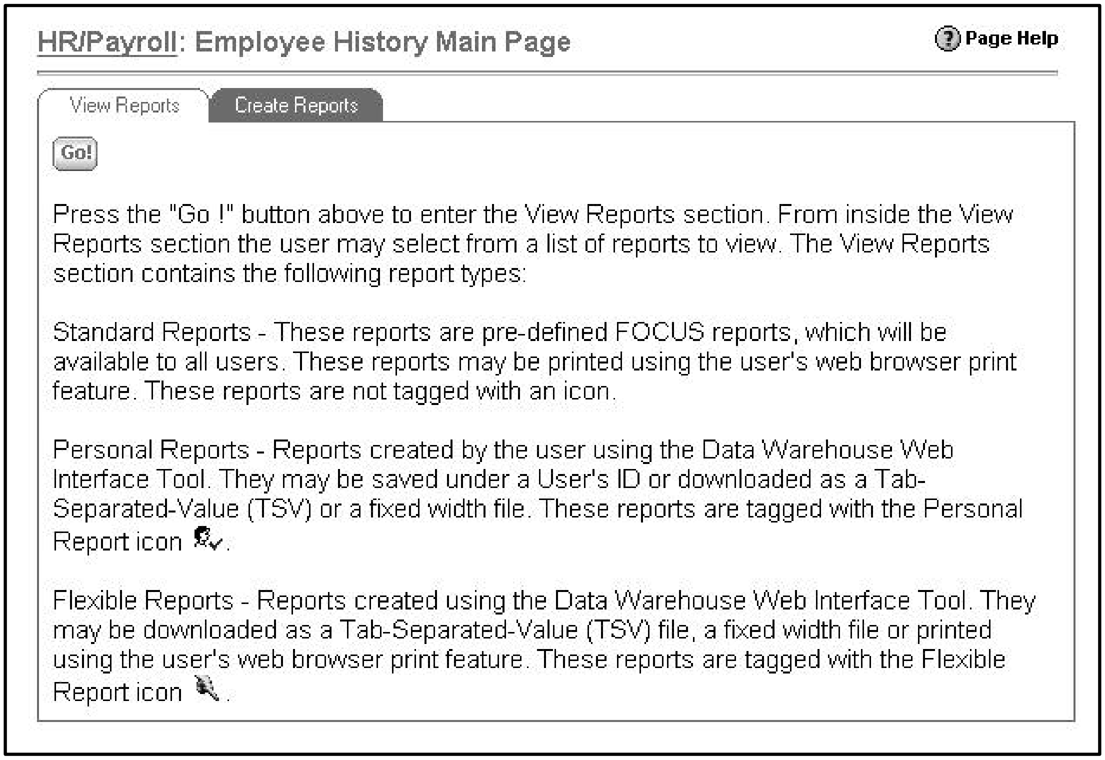
**Step 7.** When satisfied with the entered criteria, click on the **View Results** button to see the results of your query.

**Step 8.** Select the appropriate options from the View Results page: view the report online, download the report, and/or save the report.

**Step 9.** (Optional) Create a Flexible Report from your saved Personal Report if desired.



# AREA OF ANALYIS MAIN PAGE: VIEW REPORTS



HR/Payroll: Employee History Main Page

Page Help

View Reports | Create Reports

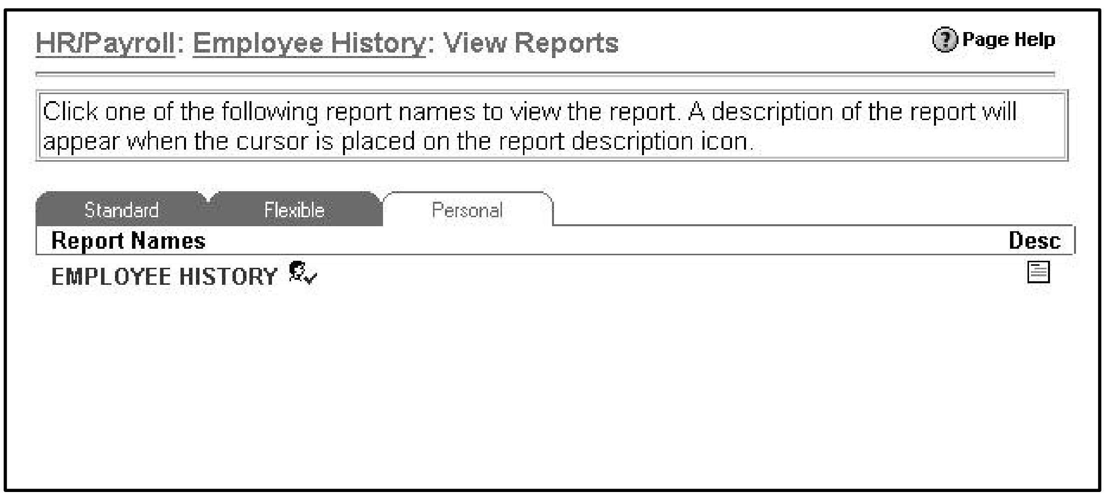
Go!

Press the "Go !" button above to enter the View Reports section. From inside the View Reports section the user may select from a list of reports to view. The View Reports section contains the following report types:

Standard Reports - These reports are pre-defined FOCUS reports, which will be available to all users. These reports may be printed using the user's web browser print feature. These reports are not tagged with an icon.

Personal Reports - Reports created by the user using the Data Warehouse Web Interface Tool. They may be saved under a User's ID or downloaded as a Tab-Separated-Value (TSV) or a fixed width file. These reports are tagged with the Personal Report icon .

Flexible Reports - Reports created using the Data Warehouse Web Interface Tool. They may be downloaded as a Tab-Separated-Value (TSV) file, a fixed width file or printed using the user's web browser print feature. These reports are tagged with the Flexible Report icon .



HR/Payroll: Employee History: View Reports

Page Help

Click one of the following report names to view the report. A description of the report will appear when the cursor is placed on the report description icon.

Standard | Flexible | Personal

| Report Names | Desc |
| --- | --- |
| EMPLOYEE HISTORY | |

# AREA OF ANALYIS MAIN PAGE: VIEW REPORTS

Recall that the Main Page of any Area of Analysis displays two tabs: the View Reports tab and the Create Reports tab. The View Reports tab is covered below.

**VIEW REPORTS TAB**

The View Reports tab on the Area of Analysis Main Page is the starting point for viewing reports. This tab includes a brief summary of each type of report (Personal, Flexible, and Standard). In addition, if the Area of Analysis selected is from the *Agency Detail* group, the user will select their home agency from the *Home Agency* or *Home/Charged Agency* dropdown box. The user must have security clearance for the agency selected. The selected agency will also determine what reports are available. If the user is in an *Agency Detail* area of analysis, Standard Reports will include data for their home agency only (unless the user is from OA). Standard Reports in statewide areas of analysis will include statewide information.

**Note:** The "ALL" option of the *Home Agency* or *Home/Charged Agency* dropdown box is available to OA users only.

After selecting the correct agency (if necessary), click on the ***Go!*** button 

to enter the View Reports page. The View Reports page has three available tabs: Standard, Flexible, and Personal. Click on the appropriate tab to see the reports available.

Available reports are listed under the "Report Name" column. To display the description of the report, place your mouse pointer over the icon under the "Desc" column.

Clicking on a report title takes the user to the View Results screen. From here, follow the procedures for viewing online, downloading, or saving.

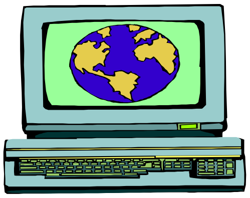
# NOTES

# TOPIC 4: WALKTHROUGHS AND EXERCISES

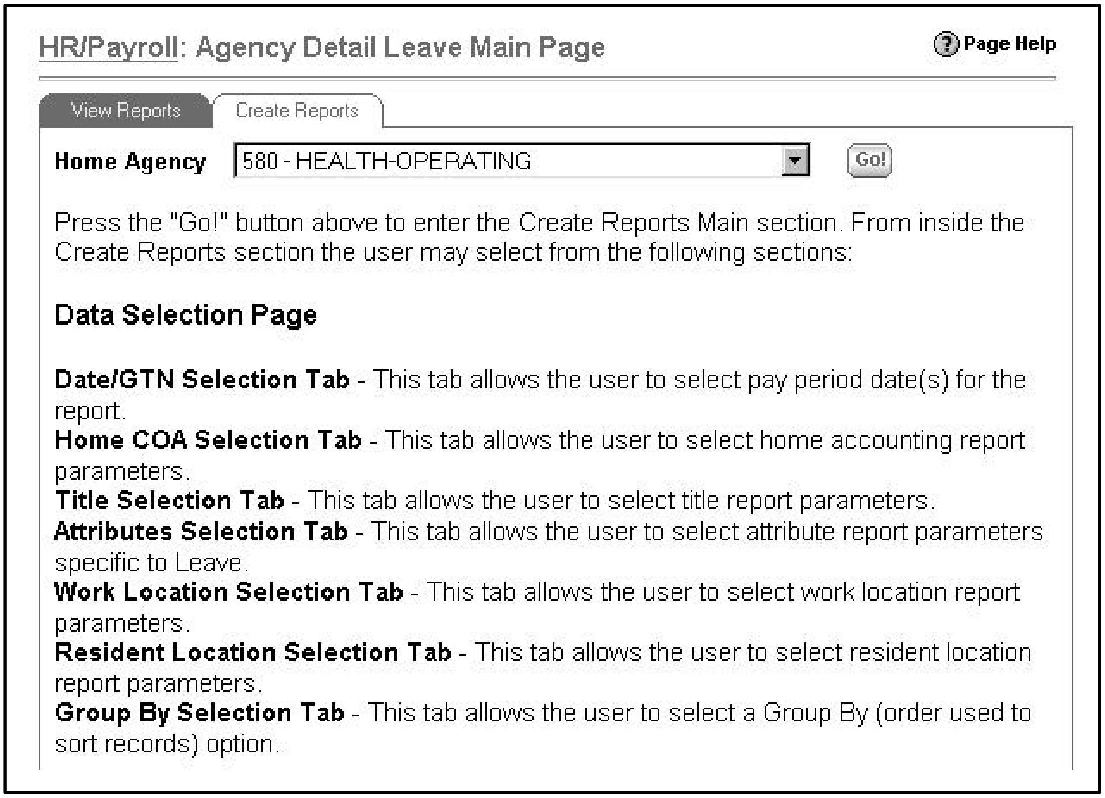
This topic contains several instructor-led walkthroughs and individual exercises to be performed without the help of the instructor.

**After completing this topic, you will:**

- Be comfortable navigating and extracting data from the SAM II HR/Payroll Data Warehouse Web Interface



# WALKTHROUGH 1: AGENCY DETAIL LEAVE



HR/Payroll: Agency Detail Leave Main Page

Page Help

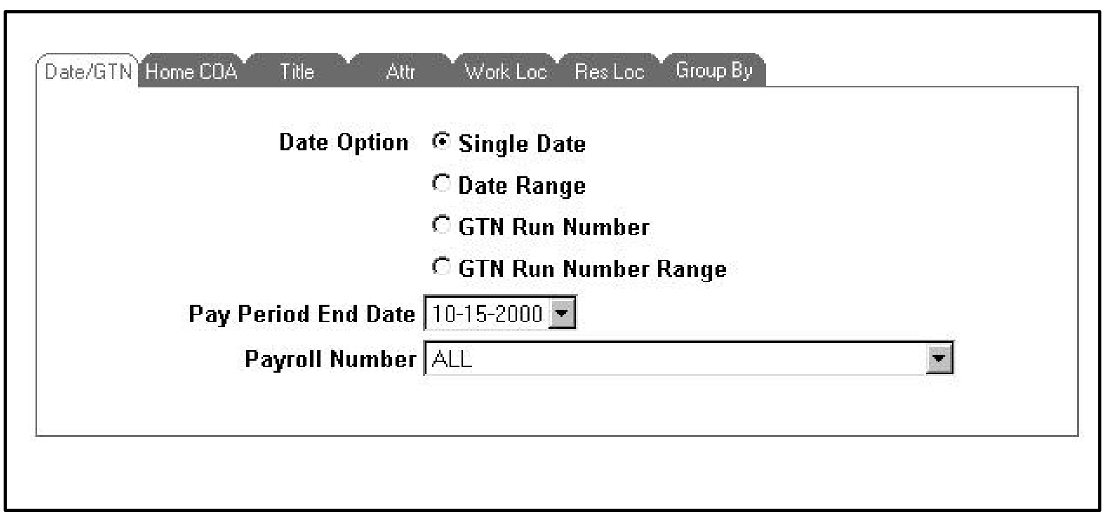
View Reports | Create Reports

**Home Agency** 580 - HEALTH-OPERATING Go!

Press the "Go!" button above to enter the Create Reports Main section. From inside the Create Reports section the user may select from the following sections:

**Data Selection Page**

**Date/GTN Selection Tab** - This tab allows the user to select pay period date(s) for the report.
**Home COA Selection Tab** - This tab allows the user to select home accounting report parameters.
**Title Selection Tab** - This tab allows the user to select title report parameters.
**Attributes Selection Tab** - This tab allows the user to select attribute report parameters specific to Leave.
**Work Location Selection Tab** - This tab allows the user to select work location report parameters.
**Resident Location Selection Tab** - This tab allows the user to select resident location report parameters.
**Group By Selection Tab** - This tab allows the user to select a Group By (order used to sort records) option.



Date/GTN | Home COA | Title | Attr | Work Loc | Res Loc | Group By

**Date Option** ◉ Single Date ○ Date Range ○ GTN Run Number ○ GTN Run Number Range

**Pay Period End Date** 10-15-2000

**Payroll Number** ALL

# WALKTHROUGH 1: AGENCY DETAIL LEAVE

**Scenario**

You work for the Department of Health. You've received a request to generate a report of the annual leave balances and usage of all Computer Information Technologist II's (title code ***000152***) within the Information Systems division (organization code ***3023***) who have the sub-title ***Q1*** and work in Jefferson City. Additional report criteria follows:

- The report should only include employees using the standard leave policy (***STAND***).
- The report should be as of the pay period ended October 15, 2000.
- The report should display leave usage and accruals for the current pay period as well as the year to date.
- The report should be sorted in the following order: Employee ID, Work Location, and Home Organization.

Follow the steps below to create the report.

**Step 1.** Log into the SAM II Data Warehouse Web Interface and access the HR/Payroll section.

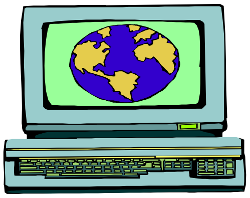
**Step 2.** Enter the *Agency Detail Leave* Area of Analysis by clicking the link.

**Step 3.** Click on the ***Create Reports*** tab.

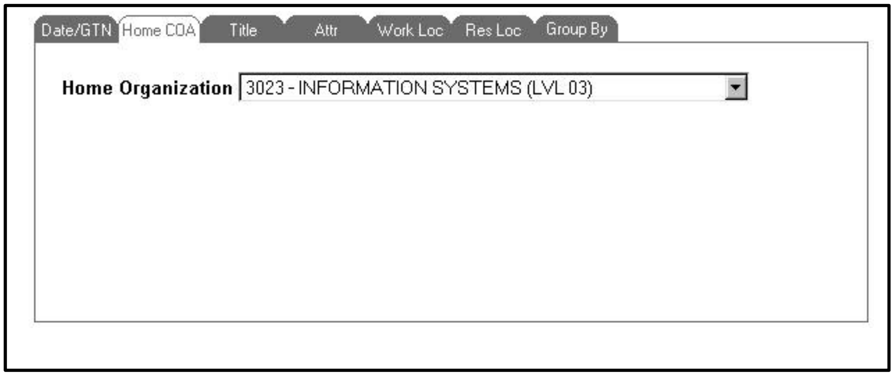
**Step 4.** Select ***580 – HEALTH-OPERATING*** from the *Home Agency* dropdown box and click the ***Go!*** button.

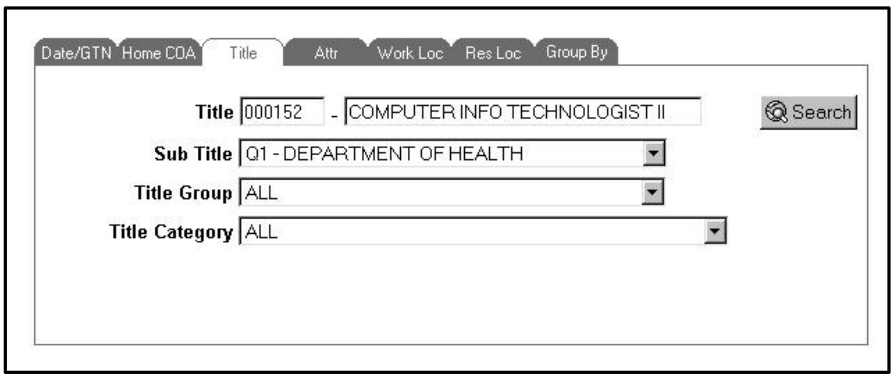
**Step 5.** On the Date/GTN selection tab, enter the following options:

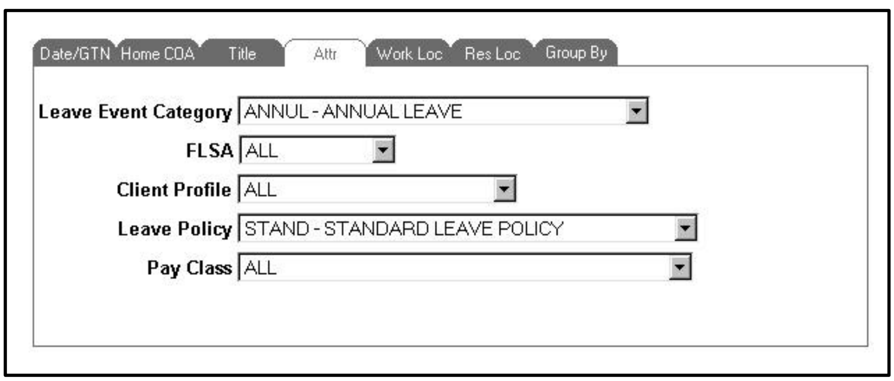
*Date Option:* ***Single Date***
*Pay Period End Date:* ***10-15-2000***

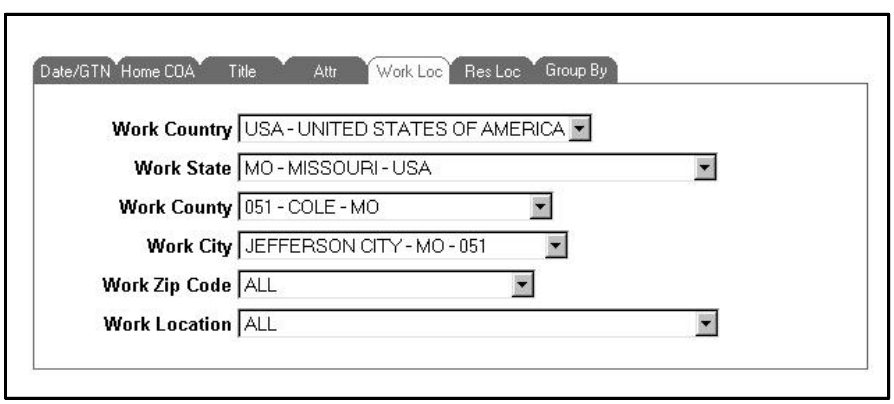


# WALKTHROUGH 1: AGENCY DETAIL LEAVE



# WALKTHROUGH 1: AGENCY DETAIL LEAVE

**Step 6.** Click on the Home COA selection tab and enter the following options:

*Home Organization:* ***3023 – INFORMATION SYSTEMS (LVL 03)***

**Step 7.** Click on the Title selection tab and enter the following options:

*Title:* ***000152***
*Sub Title:* ***Q1 – DEPARTMENT OF HEALTH***

**Step 8.** Click on the Attr selection tab and enter the following options:

*Leave Event Category:* ***ANNUL – ANNUAL LEAVE***
*Leave Policy:* ***STAND – STANDARD LEAVE POLICY***

**Step 9.** Click on the Work Loc selection tab and enter the following options:

*Work City:* ***JEFFERSON CITY – MO – 051***

**Step 10.** Click on the Group By selection tab and enter the following options:

*Group By Selections:* ***Employee ID, Work Location, Home Organization***

*Display Options:* ***Current Balance Amount, Current Usage Amount, Current Accrual Amount, YTD Usage Amount, YTD Accrual Amount, Code Descriptions, Include Lower Level Home Organizations***

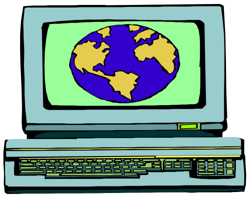
**Step 11.** Click on the ***Review Selections*** button to review your criteria.

**Step 12.** When satisfied, click on the ***View Results*** button.

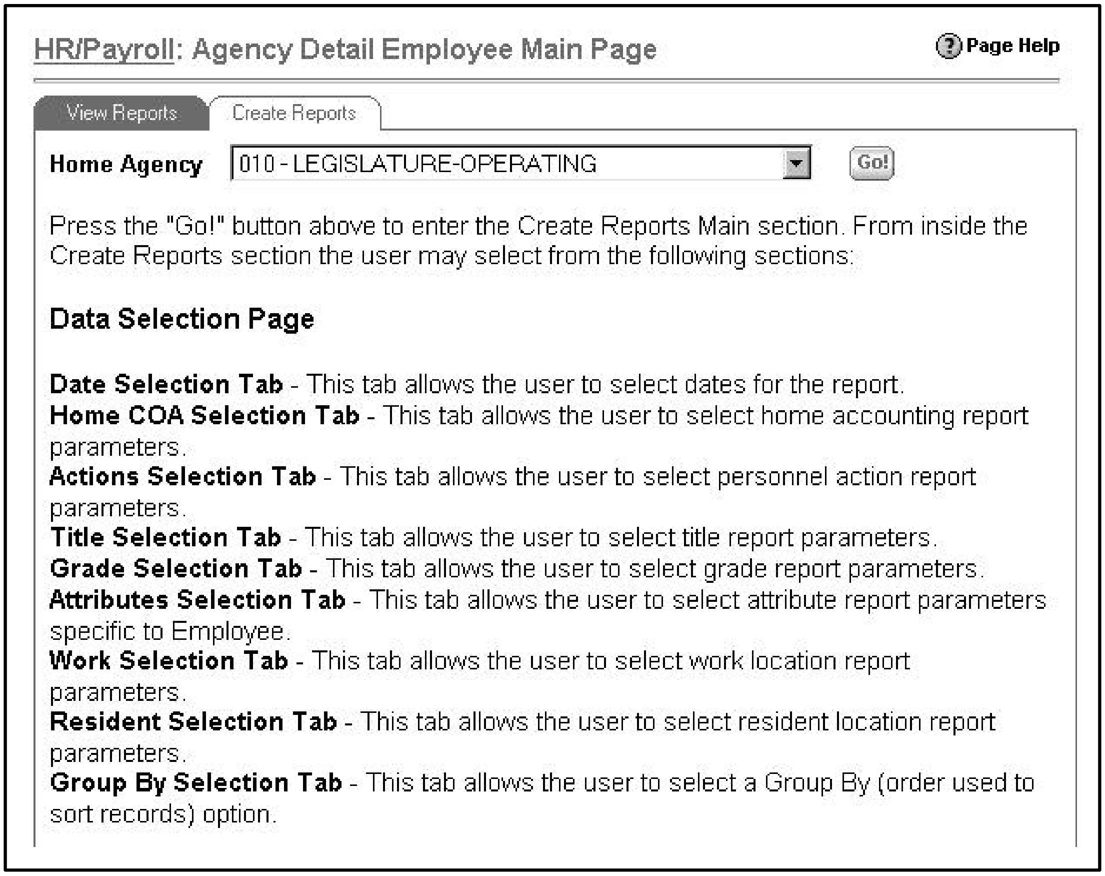
**Step 13.** To view the report, click on the ***View Report*** button.

**Step 14.** Use the various options on the View Report page to view the data in the report.

At this point, if the report was satisfactory, you would choose to download and/or save the report to be viewed later using the Personal Report Administrator.



# WALKTHROUGH 2: AGENCY DETAIL EMPLOYEE



HR/Payroll: Agency Detail Employee Main Page

Page Help

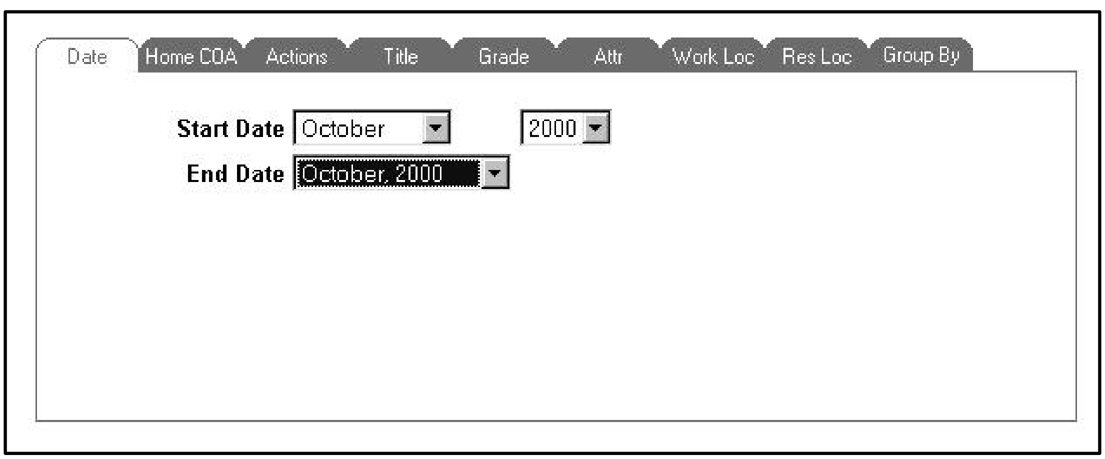
View Reports | Create Reports

**Home Agency** 010 - LEGISLATURE-OPERATING Go!

Press the "Go!" button above to enter the Create Reports Main section. From inside the Create Reports section the user may select from the following sections:

**Data Selection Page**

**Date Selection Tab** - This tab allows the user to select dates for the report.
**Home COA Selection Tab** - This tab allows the user to select home accounting report parameters.
**Actions Selection Tab** - This tab allows the user to select personnel action report parameters.
**Title Selection Tab** - This tab allows the user to select title report parameters.
**Grade Selection Tab** - This tab allows the user to select grade report parameters.
**Attributes Selection Tab** - This tab allows the user to select attribute report parameters specific to Employee.
**Work Selection Tab** - This tab allows the user to select work location report parameters.
**Resident Selection Tab** - This tab allows the user to select resident location report parameters.
**Group By Selection Tab** - This tab allows the user to select a Group By (order used to sort records) option.



# WALKTHROUGH 2: AGENCY DETAIL EMPLOYEE

**Scenario**

You work for the Legislature. You've received a request to generate a report of all Clerk Typist III's (title code ***A00028***) within the Committee for Legislative Research organization (organization code ***2025***) who's most recent personnel action is "New Hire" (personnel action code ***NHIRE***) and most recent personnel action reason is "Original Appointment." Additional report criteria follows:

- The report should only include employees with an employment status of Active (***1***).
- The report should only include employees who work full time for the Legislature.
- The report should only include employees who are paid on a pay period basis and make between $15,000.00 and $19,999.99 per year (or $625.00 to $833.33 per pay period).
- The report should be as current as possible. Therefore, the current month should be used.
- The report should be sorted in the following order: Action Date, Employee ID, First Name, Last Name, Work Location, and Salary. The report should display Code Descriptions.

Follow the steps below to create the report.

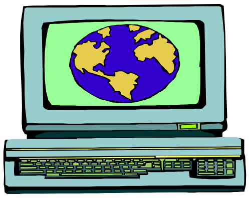
**Step 1.** Enter the *Agency Detail Employee* Area of Analysis by clicking the link.

**Step 2.** Click on the ***Create Reports*** tab.

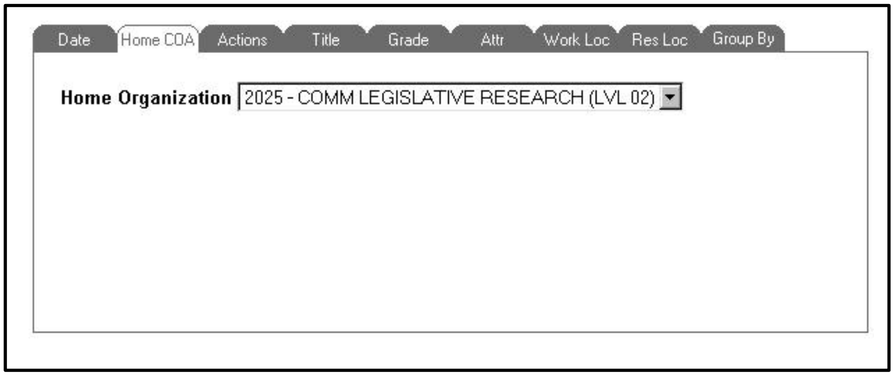
**Step 3.** Select ***010 – LEGISLATURE-OPERATING*** from the *Home Agency* dropdown box and click the ***Go!*** button.

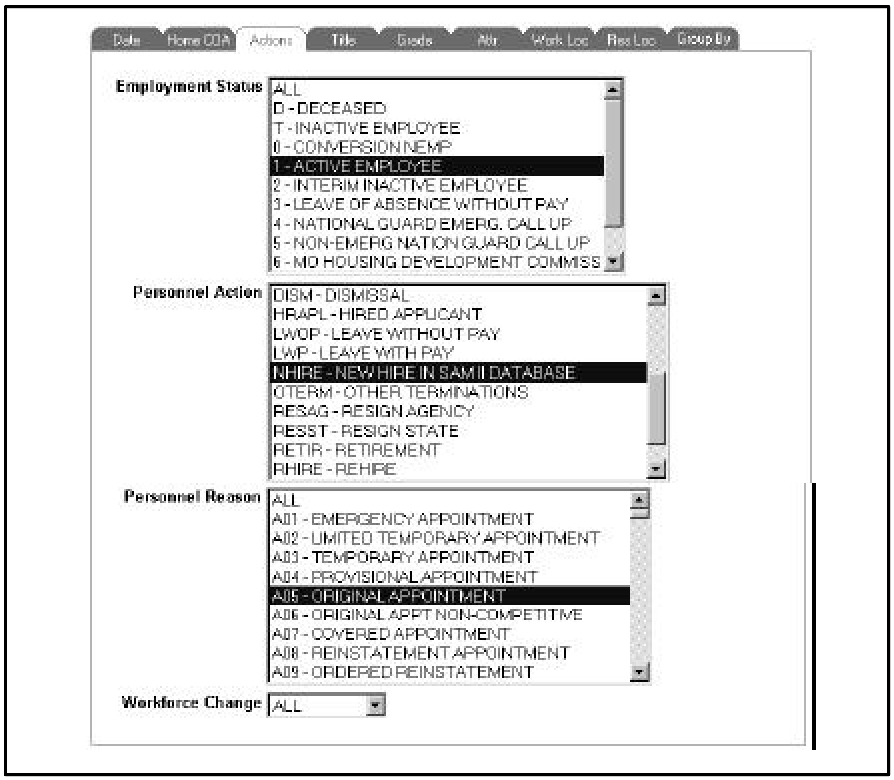
**Step 4.** On the Date selection tab, enter the following options:

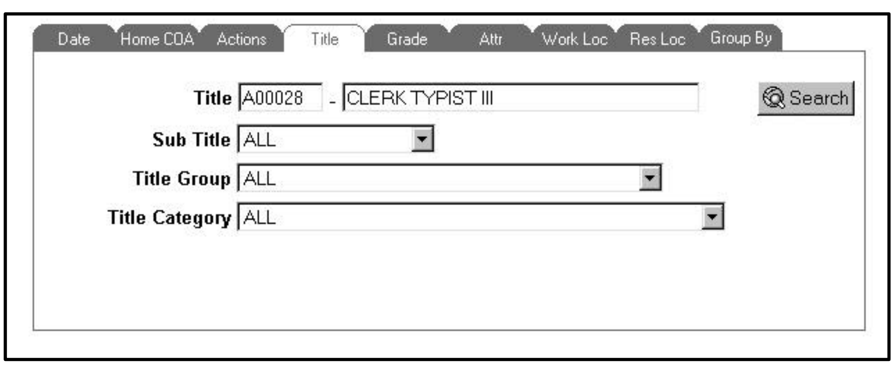
*End Date:* ***Select the current month***



# WALKTHROUGH 2: AGENCY DETAIL EMPLOYEE



# WALKTHROUGH 2: AGENCY DETAIL EMPLOYEE

**Step 5.** Click on the Home COA selection tab and enter the following options:

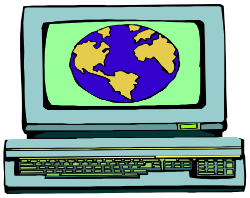
*Home Organization:* ***2025 – COMM LEGISLATIVE RESEARCH (LVL 02)***

**Step 6.** Click on the Actions selection tab and enter the following options:

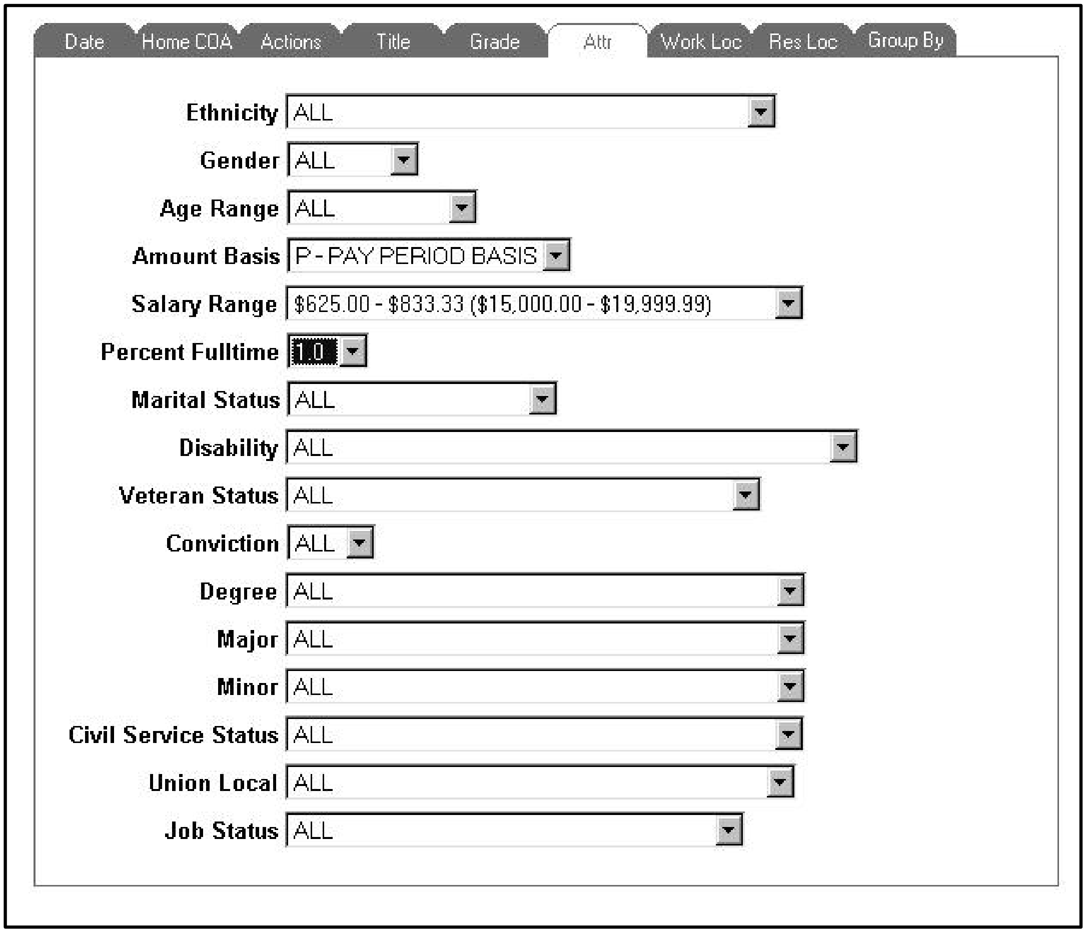
*Employment Status:* ***1 – ACTIVE EMPLOYEE***
*Personnel Action:* ***NHIRE – NEW HIRE IN SAM II DATABASE***
*Personnel Reason:* ***A05 – ORIGINAL APPOINTMENT***

**Step 7.** Click on the Title selection tab and enter the following options:

*Title:* ***A00028***



# WALKTHROUGH 2: AGENCY DETAIL EMPLOYEE



# WALKTHROUGH 2: AGENCY DETAIL EMPLOYEE

**Step 8.** Click on the Attr selection tab and enter the following options:

*Amount Basis:* ***P – PAY PERIOD BASIS***
*Salary Range:* ***$625.00 - $833.33 ($15,000.00 - $19,999.99)***
*Percent Fulltime:* ***1.0***

**Note:** The *Amount Basis* field must be set to the value employees were established with in the online desktop system. Most employees are established as either hourly or on a pay period basis. The numbers in parenthesis in the *Salary Range* field values represent the calculated annual rate. For example, if an employee makes $25,000.00 per year in salary and is set up on a pay period basis, running a query with an *Amount Basis* of ***A – ANNUAL BASIS*** and a *Salary Range* of ***$20,000.00 - $39,999.99*** will not select the employee's record. Instead, the *Amount Basis* should be set to ***P – PAY PERIOD BASIS*** and the *Salary Range* should be set to ***$1,041.67 - $1,250.00 ($25,000.00 - $29,999.99)***.

**Step 9.** Click on the Group By selection tab and enter the following options:

*Group By Selections:* ***Action Date, Employee ID, First Name, Last Name, Work Location, Salary***

*Display Options:* ***Code Descriptions***

**Step 10.** Click on the ***Review Selections*** button to review your criteria.

**Step 11.** When satisfied, click on the ***View Results*** button.

**Step 12.** To view the report, click on the ***View Report*** button.

**Step 13.** Use the various options on the View Report page to view the data in the report.

At this point, if the report was satisfactory, you would choose to download and/or save the report to be viewed later using the Personal Report Administrator.

# EXERCISE 1: AGENCY DETAIL POSITION

**Scenario**

You work for the Department of Health (agency ***580***). You've received a request to generate a single report of all permanent positions within the Department of Health with a status of either "Add Position to System" (***ACTVA***) or "Edit Existing Position (***ACTVE***), as of today. Additional report criteria follows:

- The report should be sorted in the following order: Position Number, Title, Sub Title, Position Status, First Allocated Date, and Position Organization. The report should display Code Descriptions.

Take the steps necessary to generate this report. Answer the following questions:

1) How many records did your report select?

2) What position number is on the first line of the report?

3) What organizations within the Department of Health have positions in a status of either "ACTVA" or "ACTVE?"

4) List some of the title descriptions for the positions selected.

# EXERCISE 2: SUMMARY DEMOGRAPHICS

**Scenario**

You've received a request to generate a report of the number of hourly employees working for the state today under the title of "Miscellaneous Professional" (title code ***009811***) who make less than $20,000.00 per year (or $9.62 per hour). Additional report criteria follows:

- The report should be sorted in the following order: Home Agency, Home Organization, Sub Title, and Salary. The report should display the Employee Count and Code Descriptions.

Take the steps necessary to generate this report. Answer the following questions:

1) How many records did your report select?

2) What agency and organization combinations have Miscellaneous Professionals making under $20,000.00 working for them?

3) List the number of Miscellaneous Professionals making under $20,000.00 working within each agency and organization from Question 2.

4) What is the average pay rate of these employees?

# EXERCISE 3: SUMMARY POSITION

**<u>Scenario</u>**

You've received a request to generate a report of the number of positions, statewide, for Registered Nurse III's that had a status of either "Add Position to System" (***ACTVA***) or "Edit Existing Position (***ACTVE***), on October 1st, 2000. Additional report criteria follows:

- The report should be sorted in the following order: First Allocated Date, Position Agency, Position Organization, and Position Status. The report should display the Position Count and Code Descriptions.

Take the steps necessary to generate this report. Answer the following questions:

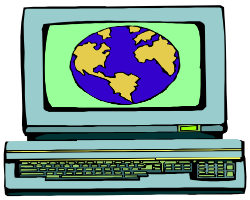
1) How many records did your report select?

2) What agency and organization combinations had Registered Nurse III positions on October 1st, 2000?

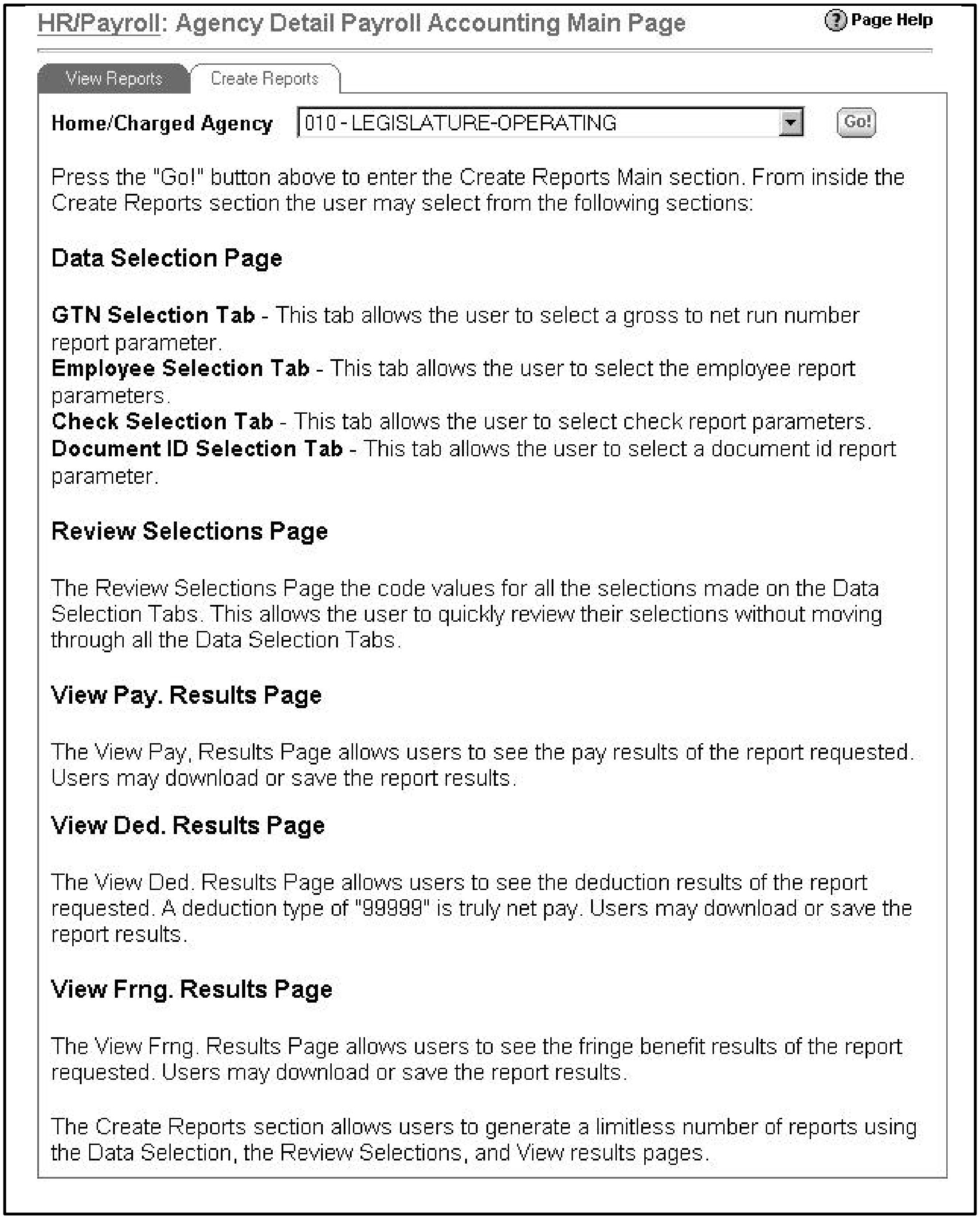
3) List the number of Registered Nurse III positions each agency and organization combination from Question 2 had on October 1st, 2000.

4) What is the earliest date a Registered Nurse III position was allocated? What agency and organization was it for?

# NOTES



# APPENDIX A: CREATE REPORTS TAB OF AGENCY DETAIL PAYROLL ACCOUNTING



HR/Payroll: Agency Detail Payroll Accounting Main Page

Page Help

View Reports | Create Reports

**Home/Charged Agency** 010 - LEGISLATURE-OPERATING Go!

Press the "Go!" button above to enter the Create Reports Main section. From inside the Create Reports section the user may select from the following sections:

**Data Selection Page**

**GTN Selection Tab** - This tab allows the user to select a gross to net run number report parameter.
**Employee Selection Tab** - This tab allows the user to select the employee report parameters.
**Check Selection Tab** - This tab allows the user to select check report parameters.
**Document ID Selection Tab** - This tab allows the user to select a document id report parameter.

**Review Selections Page**

The Review Selections Page the code values for all the selections made on the Data Selection Tabs. This allows the user to quickly review their selections without moving through all the Data Selection Tabs.

**View Pay. Results Page**

The View Pay, Results Page allows users to see the pay results of the report requested. Users may download or save the report results.

**View Ded. Results Page**

The View Ded. Results Page allows users to see the deduction results of the report requested. A deduction type of "99999" is truly net pay. Users may download or save the report results.

**View Frng. Results Page**

The View Frng. Results Page allows users to see the fringe benefit results of the report requested. Users may download or save the report results.

The Create Reports section allows users to generate a limitless number of reports using the Data Selection, the Review Selections, and View results pages.

# APPENDIX A: CREATE REPORTS TAB OF AGENCY DETAIL PAYROLL ACCOUNTING

The Create Reports tab on the *Agency Detail Payroll Accounting* Main Page is the starting point for creating personal reports. This tab includes a brief summary of each of the various options users will be presented with when creating reports. The user must first select their home agency from the *Home/Charged Agency* dropdown box. The user must have security clearance for the agency selected.

**Note:** The "ALL" option of the *Home/Charged Agency* dropdown box is available to OA users only.

After selecting the correct agency, click on the ***Go!*** button to begin

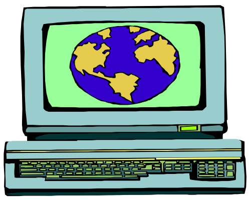

report creation. The ***Go!*** link takes the user to the first report creation page. The following main options are available from the report creation pages of the *Agency Detail Payroll Accounting* area:

- Data Selection
- Review Selections
- View Pay. Results
- View Ded. Results
- View Frng. Results
- Undo Selections

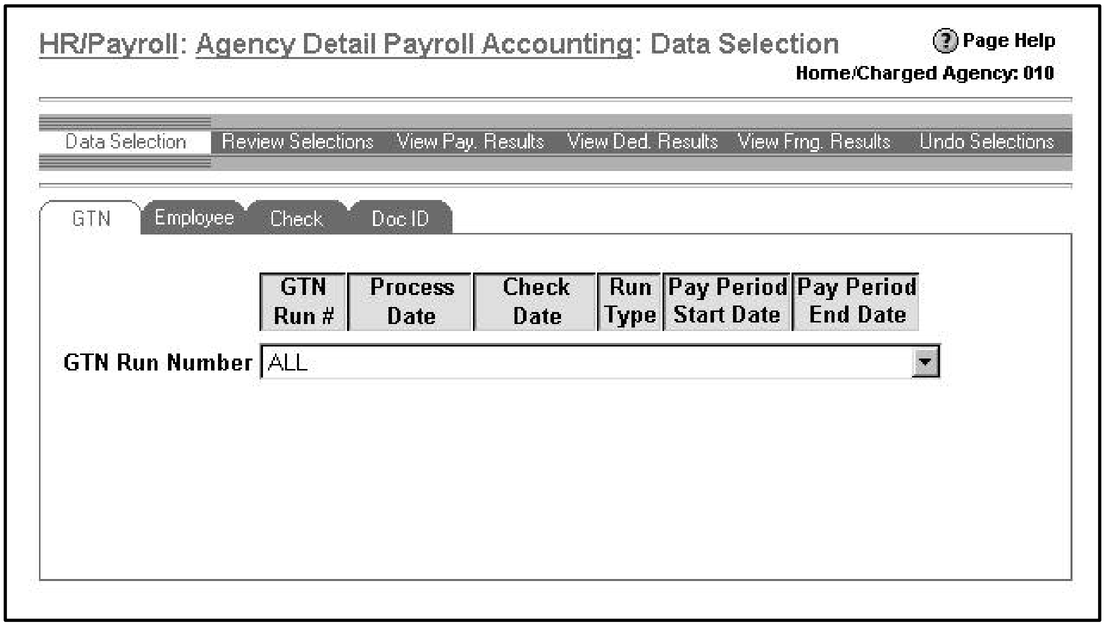
Clicking the **Data Selection** link opens the Data Selection page. The Data Selection page is used to specify what data to report on. Using the various data selection tabs, criteria can be limited by the following:

- GTN Run Number
- Employee and/or Appointment ID
- Check Information (date, bank account, and/or check number)
- JVP Document Number

Select the desired reporting criteria as you would for any Area of Analysis. When finished, use the **Review Selections** link to review and edit your criteria as necessary.



# APPENDIX A: CREATE REPORTS TAB OF AGENCY DETAIL PAYROLL ACCOUNTING



# APPENDIX A: CREATE REPORTS TAB OF AGENCY DETAIL PAYROLL ACCOUNTING

## VIEW RESULTS PAGES

The *Agency Detail Payroll Accounting* Area of Analysis has three **View Results** pages: **View Pay. Results**, **View Ded. Results**, and **View Frng. Results**. Clicking on any of the **View Results** buttons runs the query based on the selected criteria and opens the View Results page. This page shows the selection criteria and statistics for the query that was just executed. From this page users may view the generated report online, download it, or save the report design as a Personal Report.

## VIEW PAY. RESULTS

This View Results page shows employee pay information. The generated report will include the following fields: GTN Run Number, Employee ID, Appointment ID, Last Name, First Name, Middle Name, Check Date, Bank Account, Check Number, (JVP) Document ID, Fiscal Year, Fiscal Month, Pay Type, Fund, Agency, Appropriation, Organization, Sub Organization, Activity, Function, Object, Sub Object, Reporting Category, Job/Project, and Pay Amount.

## VIEW DED. RESULTS

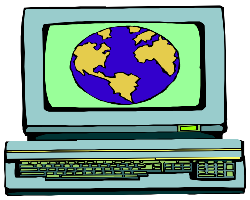
This View Results page shows employee deduction information. The generated report will include the following fields: GTN Run Number, Employee ID, Appointment ID, Last Name, First Name, Middle Name, Check Date, Bank Account, Check Number, (JVP) Document ID, Fiscal Year, Fiscal Month, Deduction Type, Deduction Plan, Fund, Balance Sheet Account, and Deduction Amount.

## VIEW FRNG. RESULTS

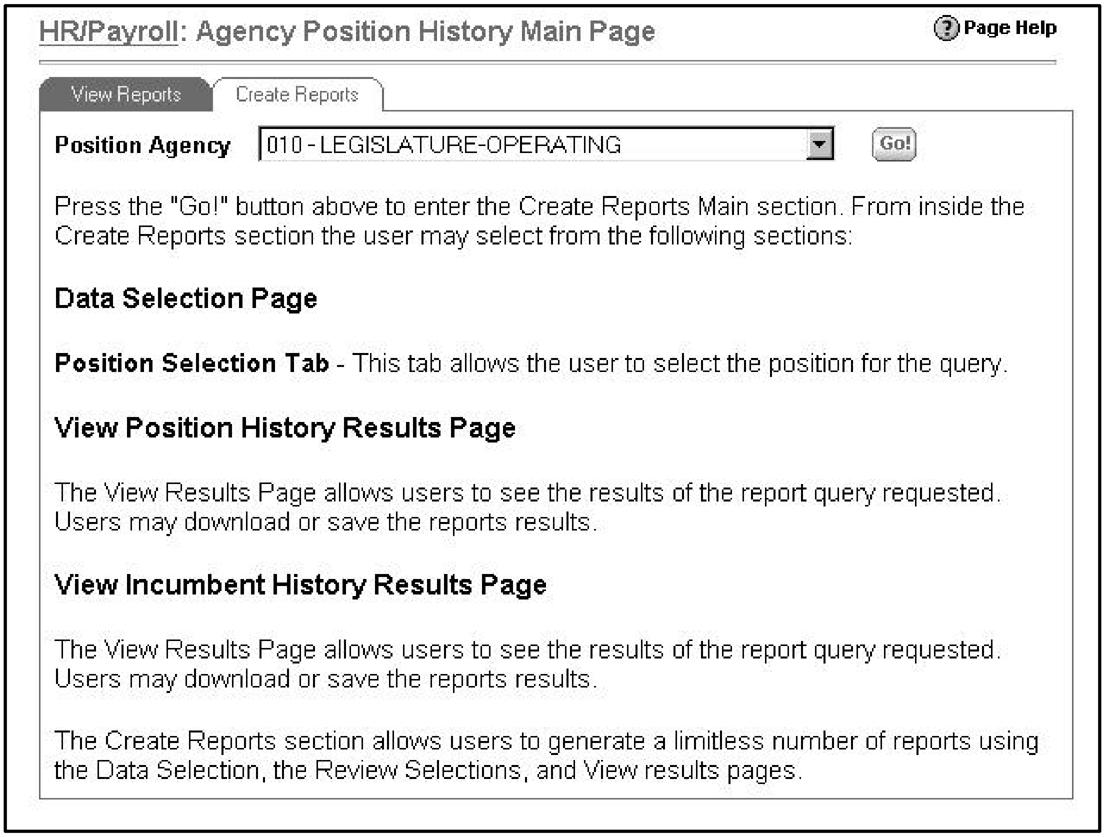
This View Results page shows employee fringe information. The generated report will include the following fields: GTN Run Number, Employee ID, Appointment ID, Last Name, First Name, Middle Name, Check Date, Bank Account, Check Number, (JVP) Document ID, Fiscal Year, Fiscal Month, Pay Type, Fund, Agency, Appropriation, Organization, Sub Organization, Activity, Function, Object, Sub Object, Reporting Category, Job/Project, and Fringe Amount.

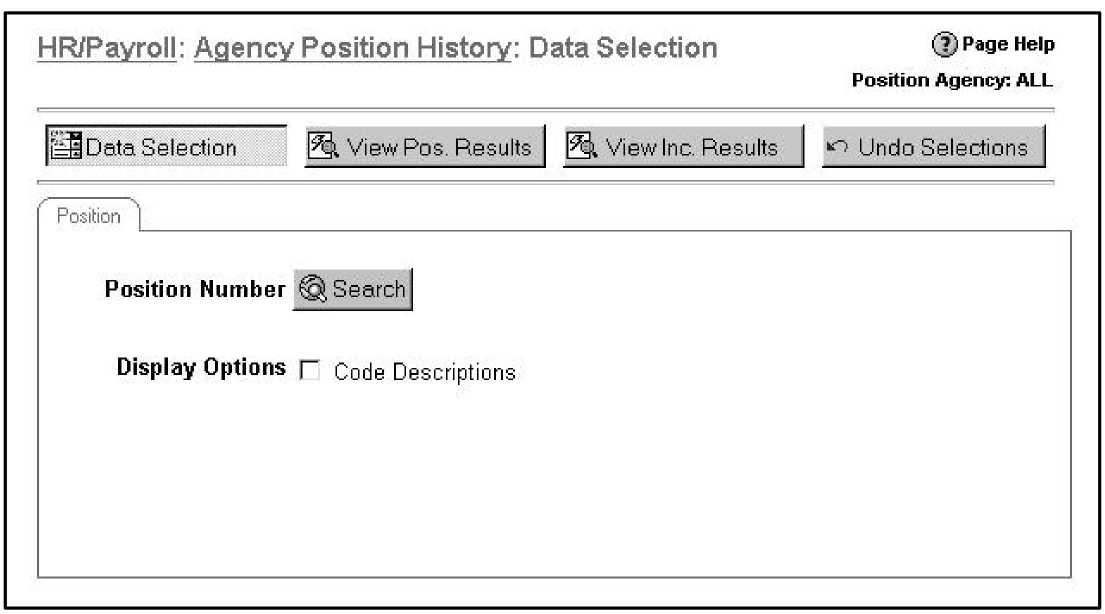
## UNDO SELECTIONS

Clicking on the **Undo Selections** button returns the user to the Main Page and resets all criteria selected on the Data Selection page.



# APPENDIX B: CREATE REPORTS TAB OF AGENCY DETAIL POSITION HISTORY



# APPENDIX B: CREATE REPORTS TAB OF AGENCY DETAIL POSITION HISTORY

The Create Reports tab on the *Agency Detail Position History* Main Page is the starting point for creating personal reports. This tab includes a brief summary of each of the various options users will be presented with when creating reports. The user must first select their home agency from the *Position Agency* dropdown box. The user must have security clearance for the agency selected.

**Note:** The "ALL" option of the *Position Agency* dropdown box is available to OA users only.

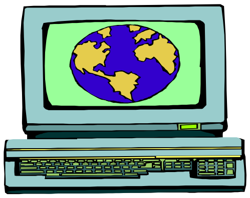
After selecting the correct agency, click on the ***Go!*** button to begin report creation. The ***Go!*** link takes the user to the first report creation page. The following four main options are available from the report creation pages of the *Agency Detail Position History* area:


- Data Selection
- View Pos. Results
- View Inc. Results
- Undo Selections

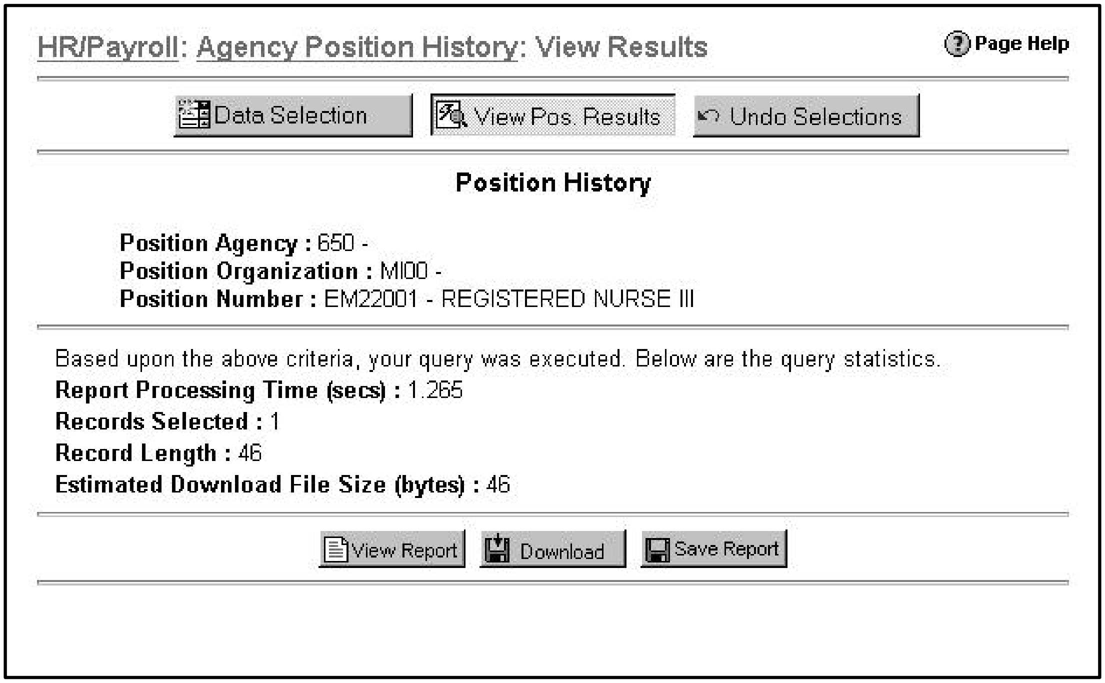
Clicking the **Data Selection** button opens the Data Selection page. The Data Selection page is used to specify what position to report on. To select a position, click on the **Search** button. The Search page has four options to search for position codes:

- By Position Number
- By Position Description
- By Title Code
- By Title Description

Select the desired search method by clicking the appropriate radio button. Enter at least one character in the field provided and click the **Search** button. Click on a value from the generated list to select it and return to the Data Selection page. The Position Agency, Position Organization, and Position Number will be displayed. Click the *Code Descriptions* checkbox if you wish to display code descriptions on the report.



# APPENDIX B: CREATE REPORTS TAB OF AGENCY DETAIL POSITION HISTORY



HR/Payroll: Agency Position History: View Results

Page Help

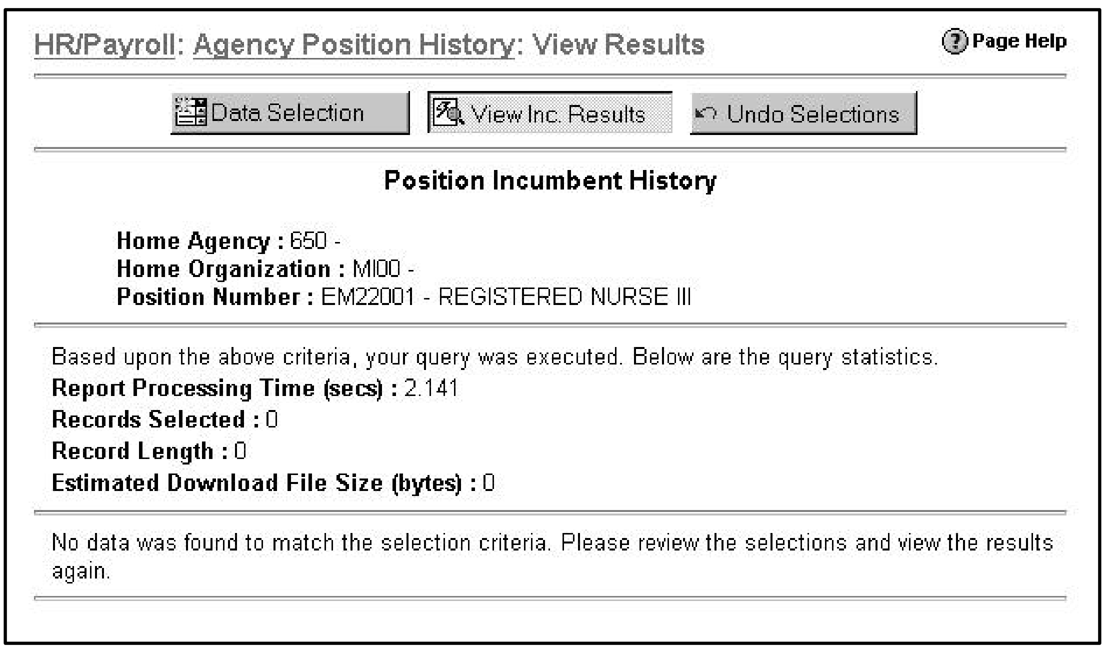
Data Selection | View Pos. Results | Undo Selections

**Position History**

**Position Agency :** 650 -
**Position Organization :** MI00 -
**Position Number :** EM22001 - REGISTERED NURSE III

Based upon the above criteria, your query was executed. Below are the query statistics.
**Report Processing Time (secs) :** 1.265
**Records Selected :** 1
**Record Length :** 46
**Estimated Download File Size (bytes) :** 46

View Report | Download | Save Report



HR/Payroll: Agency Position History: View Results

Page Help

Data Selection | View Inc. Results | Undo Selections

**Position Incumbent History**

**Home Agency :** 650 -
**Home Organization :** MI00 -
**Position Number :** EM22001 - REGISTERED NURSE III

Based upon the above criteria, your query was executed. Below are the query statistics.
**Report Processing Time (secs) :** 2.141
**Records Selected :** 0
**Record Length :** 0
**Estimated Download File Size (bytes) :** 0

No data was found to match the selection criteria. Please review the selections and view the results again.

# APPENDIX B: CREATE REPORTS TAB OF AGENCY DETAIL POSITION HISTORY

### VIEW POS. RESULTS

Clicking on the **View Pos. Results** button runs the query based on the selected position and opens the View Results page. The View Results page shows the selection criteria and statistics for the query that was just executed. From this page users may view the generated report online, download it, or save the report design as a Personal Report.

**Note:** The data returned will include all records for the selected position since the position's inception, including status, Title and Sub-Title, prior position number, and pre-SAM II Department and Division number.

### VIEW INC. RESULTS

Clicking on the **View Inc. Results** button runs a query based on the selected position and opens the View Results page. This query searches for all incumbents ever in the selected position. The View Results page shows the selection criteria and statistics for the query that was just executed. From this page users may view the generated report online, download it, or save the report and a Personal Report.

**Note:** The data returned will include all employees that were ever in the selected position since inception.

### UNDO SELECTIONS

Clicking on the **Undo Selections** button returns the user to the Main Page, and resets the position selected on the Data Selection page.

# APPENDIX C: DATA SELECTION TABS BY AREA OF ANALYSIS

### EMPLOYEE HISTORY

- **Employee –** Used to select an individual employee for reporting. Employees can be selected by name or Employee ID. Entering a valid employee ID in the *Employee ID* field will populate the *Name* field. To select by name, use the **Search** button. Use the *Pre-SAM II Data* display option to display pre-SAM II historical information for the employee.

  **Note:** If you choose to view an *Employee History* report online, clicking on any line on the generated report will take the user to a screen with more detail about that particular line.

### AGENCY DETAIL BENEFITS

- **Date/GTN –** Selecting a payroll number on this tab will include data from all payrolls of that number within the date or GTN range selected. Note that if you only have security access to one agency, and the agency has only one payroll number, selecting the payroll number is not necessary.

- **Home COA**

- **Title**

- **Attr –** Available criteria: *Benefit Event Category*.

- **Group By –** Available Group By Choices: *Appointment ID; Benefit Event Category*; *Employee ID*; *First Name*; *GTN Run Number*; *Home Agency; Home Organization*; *Last Name*; *Middle Name*; *Pay Period End Date; Payroll Number*; *Position Number*; *Sub Title*; *Title Category*; *Title Group*; *Title*.

  Available Display Options: *Benefit Amount* (required), and *Code Descriptions*, to display the long descriptions of codes.

### AGENCY DETAIL DEDUCTIONS

- **Date/GTN –** Selecting a payroll number on this tab will include data from all payrolls of that number within the date or GTN range selected. Note that if you only have security access to one agency, and the agency has only one payroll number, selecting the payroll number is not necessary.

- **Home COA**

- **Title**

# APPENDIX C: DATA SELECTION TABS BY AREA OF ANALYSIS

## AGENCY DETAIL DEDUCTIONS—CONTINUED

- **Attr –** Available criteria: *Deduction Event Category*.
- **Group By –** Available Group By Choices: *Appointment ID*; *Deduction Event Category*; *Employee ID*; *First Name*; *GTN Run Number*; *Home Agency, Home Organization*; *Last Name*; *Middle Name*; *Pay Period End Date*; *Payroll Number*; *Position Number*; *Sub Title*; *Title Category*; *Title Group*; *Title*.

  Available Display Options: *Deduction Amount* (required), and *Code Descriptions*, to display the long descriptions of codes.

## AGENCY DETAIL EMPLOYEE

- **Date**
- **Home COA**
- **Actions –** Use this tab to limit criteria by specific Employment Statuses, Personnel Actions, Personnel Reasons, and/or whether the workforce increased, decreased, or remained unchanged ("No Effect"). Use the SHIFT (to select a range of options from a list) or CTRL (to select multiple options individually) keys to select more than one option from a list.

  **Note:** If you use *only* Personnel Action(s) and/or Personnel Reason(s) as criteria for your report (i.e., all other criteria on the Home COA, Actions, Title, Grade, Attr, Work Loc, and Res Loc selection tabs are set to "ALL"), *and* you limit your Group By selections to "Personnel Action," "Personnel Action Reason," "Appointment ID," and/or employee name fields (first, middle, and/or last), the data returned will include any employee record that had the selected action(s) and/or reason(s) at any time within the date range you specified on the Date tab. If any other criteria are entered, the data returned will only include employees that meet the criteria *as of* the End Date entered on the Date tab.
- **Title**
- **Grade –** The options available in the *Step* field are determined by the value selected in the *Grade* field.

# APPENDIX C: DATA SELECTION TABS BY AREA OF ANALYSIS

### AGENCY DETAIL EMPLOYEE—CONTINUED

- **Attr** – Available criteria: *Ethnicity*; *Gender*; *Age Range*; *Amount Basis*; *Salary Range*; *Percent Fulltime*; *Marital Status*; *Disability*; *Veteran Status*; *Conviction*; *Degree*; *Major*; *Minor*; *Civil Service Status*; *Union Local*; *Job Status*.

  The options available in the *Salary Range* field are determined by the value selected in the *Amount Basis* field.

  **Note:** The *Amount Basis* field must be set to the value the employees were established with in the online desktop system. Most employees are established as either hourly or on a pay period basis. The numbers in parenthesis in the *Salary Range* field values represent the calculated annual rate. For example, if an employee makes $25,000.00 per year in salary and is set up on a pay period basis, running a query with an *Amount Basis* of ***A – ANNUAL BASIS*** and a *Salary Range* of ***$20,000.00 - $39,999.99*** will not select the employee's record. Instead, the *Amount Basis* should be set to ***P – PAY PERIOD BASIS*** and the *Salary Range* should be set to ***$1,041.67 - $1,250.00 ($25,000.00 - $29,999.99)***.

- **Work Loc** – Use this tab to limit criteria by work location. Available criteria are country, state, county, city, ZIP code, and work location code. The options available in the lower-level fields are determined by the values selected in the higher-level fields. For example, if you choose a state in the *Work State* field, the options available in the *Work County* field will be limited to counties in the state selected. The three-digit numbers next to the values in the *Work City* field are county codes.

  **Note:** You must select at least a specific city from the *Work City* field in order to select a specific ZIP code and/or work location.

- **Res Loc** – Use this tab to limit criteria by residence location. Available criteria are country, state, and county. Options available in the *Residence County* field are determined by the value selected in the *Residence State* field.

# APPENDIX C: DATA SELECTION TABS BY AREA OF ANALYSIS

### AGENCY DETAIL EMPLOYEE—CONTINUED

- **Group By** – Available Group By Choices: *Action Date*; *Amount Basis*; *Appointment ID*; *Civil Service Status*; *Conviction*; *Date of Birth*; *Degree*; *Disability*; *Employee ID*, *Employment Status*; *Ethnicity*; *First Name*; *Gender*; *Grade*; *Job Status*; *Last Name*; *Major*; *Marital Status*; *Middle Name*, *Minor*; *Percent Fulltime*; *Personnel Action Reason*; *Personnel Action*; *Position Number*; *Pre-SAMII Amount Basis*; *Pre-SAMII Salary*; *Resident Country*; *Resident County*; *Resident State*; *Salary*; *Step*; *Sub Title*; *Time Limit Control Date*; *Title Category*; *Title Group*; *Title*; *Union Local*; *Veteran Status*; *Work City*; *Work Country*; *Work County*; *Work Location*; *Work State*; *Work Zip Code*; *Workforce Change*.

  Available Display Options: *Code Descriptions*, to display the long descriptions of codes.

  **Note:** To view the entire history on an employee, make sure *Amount Basis*, *Pre-SAMII Amount Basis*, *Salary*, and *Pre-SAMII Salary* are included in your "Group By Selections" list. This information is only available when in the statewide view (***ALL – ALL AGENCIES (FOR OA REPORTING ONLY)*** is selected in the *Home Agency* field on the Create Reports tab. If you do not have access to the statewide view in the *Agency Detail Employee* area and you need pre-SAM II data, contact your security administrator and request access to the *Employee History* area, if necessary.

### AGENCY DETAIL LEAVE

- **Date/GTN** – Selecting a payroll number on this tab will include data from all payrolls of that number within the date or GTN range selected. Note that if you only have security access to one agency, and the agency has only one payroll number, selecting the payroll number is not necessary.

- **Home COA**

- **Title**

- **Attr** – Available criteria: *Leave Event Category*; *FLSA* (Exempt or Non-Exempt); *Client Profile*; *Leave Policy*; *Pay Class*.

# APPENDIX C: DATA SELECTION TABS BY AREA OF ANALYSIS

### AGENCY DETAIL LEAVE—CONTINUED

- **Work Loc –** Use this tab to limit criteria by work location. Available criteria are country, state, county, city, ZIP code, and work location code. The options available in the lower-level fields are determined by the values selected in the higher-level fields. For example, if you choose a state in the *Work State* field, the options available in the *Work County* field will be limited to counties in the state selected. The three-digit numbers next to the values in the *Work City* field are county codes.

  **Note:** You must select at least a specific city from the *Work City* field in order to select a specific ZIP code and/or work location.

- **Res Loc –** Use this tab to limit criteria by residence location. Available criteria are country, state, and county. Options available in the *Residence County* field are determined by the value selected in the *Residence State* field.

- **Group By –** Available Group By Choices: *Appointment ID*; *Client Profile*; *Employee ID*; *First Name*; *FLSA*; *Home Agency*; *Home Organization*; *Last Name*; *Leave Policy*; *Middle Name*; *Pay Class*; *Pay Period End Date*; *Payroll Number*; *Position Number*; *Resident Country*; *Resident County*; *Resident State*; *Sub Title*; *Title Category*; *Title Group*; *Title*; *Work City*; *Work Country*; *Work County*; *Work Location*; *Work State*; *Work Zip Code*.

  Available Display Options: *Current Balance Amount* (required) and *Code Descriptions*, to display the long descriptions of codes. In addition, users may choose *Current Usage* and *Current Accrual Amount*, *LYTD* (Leave Year to Date) *Usage* and *Accrual Amount*, *MTD* (Month to Date) *Usage* and *Accrual Amount*, and *YTD* (Year to Date) *Usage* and *Accrual Amount*.

  **Note:** *Current* represents the usage and/or accrual that occurred within the date range specified on the Date/GTN selection tab. *Leave Year to Date* represents the usage and/or accrual that occurred within the Leave Year up to the date specified on the Date/GTN selection tab. An employee's Leave Year is the 12-month cycle beginning with the month the employee began accruing leave. *Month to Date* represents the usage and/or accrual that occurred within the current month up to the date specified on the Date/GTN selection tab. *Year to Date* represents the usage and/or accrual that occurred within the current calendar year (January to December) up the date specified on the Date/GTN selection tab.

  **Note:** Leave amounts are expressed in the Data Warehouse as minutes only (e.g., 3 hours and 15 minutes would be displayed as "195.00", *not* 3:15.

# APPENDIX C: DATA SELECTION TABS BY AREA OF ANALYSIS

### AGENCY DETAIL PAYROLL

- **Date/GTN –** Selecting a payroll number on this tab will include data from all payrolls of that number within the date or GTN range selected. Note that if you only have security access to one agency, and the agency has only one payroll number, selecting the payroll number is not necessary.

- **Home COA**

- **COA**

- **COA-More**

- **Title**

- **Attr** – Available criteria: *Pay Event Category*; *Pay Class*; *GTN Run Type* (Regular, Supplemental, etc.).

- **Group By** – Group By Choices: *Activity*; *Agency*; *Appointment ID*; *Appropriation*; *Employee ID*; *First Name*; *Function*; *Fund*; *GTN Run Number*; *GTN Type*; *Home/Charged Agency*; *Home/Charged Organization*; *Job*; *Last Name*; *Middle Name*; *Object*; *Organization*; *Pay Class*; *Pay Event Category*; *Pay Period End Date*; *Payroll Number*; *Position Number*; *Reporting Category*; *Sub Object*; *Sub Organization*; *Sub Title*; *Title Category*; *Title Group*; *Title*.

  Available Display Options: *Pay Amount* (required) and *Code Descriptions*, to display the long descriptions of codes.

### AGENCY DETAIL PAYROLL ACCOUNTING

See Appendix A.

### AGENCY DETAIL POSITION

- **Date –** This is always an “as of” date. Data returned will be the most current record as of the date entered.

- **Posn COA –** The options available *LDPR* field are determined by the value selected in the *Position Organization* field.

# APPENDIX C: DATA SELECTION TABS BY AREA OF ANALYSIS

### AGENCY DETAIL POSITION—CONTINUED

- **Position** – Use this tab to limit criteria by position status. Use the SHIFT (to select a range of statuses from the list) or CTRL (to select multiple statuses individually) keys to select more than one status to include in the query. Use the values in the *Permanent* field to select between permanent positions, temporary positions, or both.

- **Title**

- **Grade** – Use this tab to limit criteria by an overriding pay grade. Pay grades entered on Position Status Maintenance transactions (PSMT) in the desktop system override the pay grade associated with the position's title.

- **Group By** – Available Group By Choices: *First Allocated Date*; *LDPR*; *Override Grade*; *Permanent*; *Position Agency*; *Position Number*; *Position Organization*; *Position Status*; *Sub Title*; *Title Category*; *Title Group*; *Title*.

  Available Display Options: *Code Descriptions*, to display the long descriptions of codes. If an organization was selected on the Posn COA selection tab, a Display Option of *Include Lower Level Position Organizations* will be offered as well. In addition, information from the Position Control User Defined Screens in the desktop system (PUD1 through PUD9) may be displayed.

### AGENCY DETAIL POSITION HISTORY

See Appendix B.

### SUMMARY BENEFITS

- **Date/GTN** – Selecting a payroll number on this tab will include data from all payrolls of that number within the date or GTN range selected.

- **Home COA**

- **Title**

- **Attr** – Available criteria: *Benefit Event Category*.

# APPENDIX C: DATA SELECTION TABS BY AREA OF ANALYSIS

### SUMMARY BENEFITS—CONTINUED

- **Group By** – Available Group By Choices: *Benefit Event Category*; *GTN Run Number*; *Home Agency*; *Home Organization*; *Pay Period End Date*; *Payroll Number*; *Sub Title*; *Title Category*; *Title Group*; *Title*.

  Available Display Options: *Benefit Amount* (required) and *Code Descriptions*, to display the long descriptions of codes.

  **Note:** The *Summary Benefits* area does not give employee-specific information. Queries produce summarized dollar amounts from the employees who meet the specified criteria.

### SUMMARY DEDUCTIONS

- **Date/GTN** – Selecting a payroll number on this tab will include data from all payrolls of that number within the date or GTN range selected.
- **Home COA**
- **Title**
- **Attr** – Available criteria: *Deduction Event Category*.
- **Group By** – Available Group By Choices: *Deduction Event Category*; *GTN Run Number*; *Home Agency*; *Home Organization*; *Pay Period End Date*; *Payroll Number*; *Sub Title*; *Title Category*; *Title Group*; *Title*.

  Available Display Options: *Deduction Amount* (required) and *Code Descriptions*, to display the long descriptions of codes.

  **Note:** The *Summary Deductions* area does not give employee-specific information. Queries produce summarized dollar amounts from the employees who meet the specified criteria.

### SUMMARY DEMOGRAPHICS

- **Date**
- **Home COA**
- **Title**

# APPENDIX C: DATA SELECTION TABS BY AREA OF ANALYSIS

### SUMMARY DEMOGRAPHICS—CONTINUED

- **Attr** – Available criteria: *Ethnicity*; *Gender*; *Age Range*; *Amount Basis*; *Salary Range*; *Percent Fulltime*; *Marital Status*; *Disability*; *Veteran Status*; *Conviction*; *Degree*; *Major*; *Minor*; *Civil Service Status*; *Union Local*.

  **Note:** The *Amount Basis* field must be set to the value the employees were established with in the online desktop system. Most employees are established as either hourly or on a pay period basis. The numbers in parenthesis in the *Salary Range* field values represent the calculated annual rate. For example, if an employee makes $25,000.00 per year in salary and is set up on a pay period basis, running a query with an *Amount Basis* of ***A – ANNUAL BASIS*** and a *Salary Range* of ***$20,000.00 - $39,999.99*** will not select the employee's record. Instead, the *Amount Basis* should be set to ***P – PAY PERIOD BASIS*** and the *Salary Range* should be set to ***$1,041.67 - $1,250.00 ($25,000.00 - $29,999.99)***.

- **Work Loc** – Use this tab to limit criteria by work location. Available criteria are country, state, county, city, ZIP code, and work location code. The options available in the lower-level fields are determined by the values selected in the higher-level fields. For example, if you choose a state in the *Work State* field, the options available in the *Work County* field will be limited to counties in the state selected. The three-digit numbers next to the values in the *Work City* field are county codes.

  **Note:** You must select at least a specific city from the *Work City* field in order to select a specific ZIP code and/or work location.

- **Res Loc** – Use this tab to limit criteria by residence location. Available criteria are country, state, and county. Options available in the *Residence County* field are determined by the value selected in the *Residence State* field.

# APPENDIX C: DATA SELECTION TABS BY AREA OF ANALYSIS

### SUMMARY DEMOGRAPHICS—CONTINUED

- **Group By** – Available Group By Choices: *Amount Basis*; *Civil Service Status*; *Conviction*; *Date of Birth*; *Date*; *Degree*; *Disability*; *Ethnicity*; *Gender*; *Home Agency*; *Home Organization*; *Major*, *Marital Status*; *Minor*; *Percent Fulltime*; *Resident Country*; *Resident County*; *Resident State*; *Salary*; *Sub Title*; *Title Category*; *Title Group*; *Title*; *Union Local*; *Veteran Status*; *Work City*; *Work Country*; *Work County*; *Work Location*; *Work State*; *Work Zip Code*.

  Available Display Options: *Employee Count* (required) and *Code Descriptions*, to display the long descriptions of codes.

  **Note:** The *Summary Demographics* area does not give employee-specific information. Queries produce a count of the number of employees who meet the specified criteria.

### SUMMARY EMPLOYEE

- **Date**

- **Home COA**

- **Actions** – Use this tab to limit criteria by specific Employment Statuses, Personnel Actions, Personnel Reasons, and/or whether the workforce increased, decreased, or remained unchanged ("No Effect"). Use the SHIFT (to select a range of options from a list) or CTRL (to select multiple options individually) keys to select more than one option from a list.

  **Note:** If you use *only* Personnel Action(s) and/or Personnel Reason(s) as criteria for your report (i.e., all other criteria on the <u>Home COA</u>, <u>Actions</u>, <u>Title</u>, <u>Grade</u>, <u>Attr</u>, <u>Work Loc</u>, and <u>Res Loc</u> selection tabs are set to "ALL"), *and* you limit your <u>Group By</u> selections to "Personnel Action," "Personnel Action Reason," "Appointment ID," and/or employee name fields (first, middle, and/or last), the data returned will be a count of all employees that had the selected action(s) and/or reason(s) at any time within the date range you specified on the <u>Date</u> tab. If any other criteria are entered, the data returned will be a count of only employees that meet the criteria *as of* the End Date entered on the <u>Date</u> tab.

- **Title**

# APPENDIX C: DATA SELECTION TABS BY AREA OF ANALYSIS

**SUMMARY EMPLOYEE—CONTINUED**

- **Grade** – The options available in the *Step* field are determined by the value selected in the *Grade* field.

- **Attr** – Available criteria: *Ethnicity*; *Gender*; *Age Range*; *Amount Basis*; *Salary Range*; *Percent Fulltime*; *Marital Status*; *Disability*; *Veteran Status*; *Conviction*; *Degree*; *Major*; *Minor*; *Civil Service Status*; *Union Local*; *Job Status*.

  The options available in the *Salary Range* field are determined by the value selected in the *Amount Basis* field.

  **Note:** The *Amount Basis* field must be set to the value the employees were established with in the online desktop system. Most employees are established as either hourly or on a pay period basis. The numbers in parenthesis in the *Salary Range* field values represent the calculated annual rate. For example, if an employee makes $25,000.00 per year in salary and is set up on a pay period basis, running a query with an *Amount Basis* of ***A – ANNUAL BASIS*** and a *Salary Range* of ***$20,000.00 - $39,999.99*** will not select the employee's record. Instead, the *Amount Basis* should be set to ***P – PAY PERIOD BASIS*** and the *Salary Range* should be set to ***$1,041.67 - $1,250.00 ($25,000.00 - $29,999.99)***.

- **Work Loc** – Use this tab to limit criteria by work location. Available criteria are country, state, county, city, ZIP code, and work location code. The options available in the lower-level fields are determined by the values selected in the higher-level fields. For example, if you choose a state in the *Work State* field, the options available in the *Work County* field will be limited to counties in the state selected. The three-digit numbers next to the values in the *Work City* field are county codes.

  **Note:** You must select at least a specific city from the *Work City* field in order to select a specific ZIP code and/or work location.

- **Res Loc** – Use this tab to limit criteria by residence location. Available criteria are country, state, and county. Options available in the *Residence County* field are determined by the value selected in the *Residence State* field.

# APPENDIX C: DATA SELECTION TABS BY AREA OF ANALYSIS

## SUMMARY EMPLOYEE—CONTINUED

- **Group By –** Available Group By Choices: *Action Date*; *Amount Basis*; *Civil Service Status*; *Conviction*; *Date of Birth*; *Degree*; *Disability*; *Employment Status*; *Ethnicity*; *Gender*; *Grade*; *Job Status*; *Major*; *Marital Status*; *Minor*; *Percent Fulltime*; *Personnel Action Reason*, *Personnel Action*; *Pre-SAMII Amount Basis*; *Pre-SAMII Salary*; *Resident Country*; *Resident County*; *Resident State*; *Salary*; *Step*; *Sub Title*; *Time Limit Control Date*; *Title Category*; *Title Group*; *Title*; *Union Local*; *Veteran Status*; *Work City*; *Work Country*; *Work County*; *Work Location*; *Work State*; *Work Zip Code*; *Workforce Change*.

  Available Display Options of *Employee Count* (required) and *Code Descriptions*, to display the long descriptions of codes.

  **Note:** The *Summary Employee* area does not give employee-specific information. Queries produce a count of the number of employees who meet the specified criteria.

## SUMMARY LEAVE

- **Date/GTN –** Selecting a payroll number on this tab will include data from all payrolls of that number within the date or GTN range selected.

- **Home COA**

- **Title**

- **Attr –** Available criteria: *Leave Event Category*; *FLSA* (Exempt or Non-Exempt); *Client Profile*; *Leave Policy*; *Pay Class*.

- **Work Loc –** Use this tab to limit criteria by work location. Available criteria are country, state, county, city, ZIP code, and work location code. The options available in the lower-level fields are determined by the values selected in the higher-level fields. For example, if you choose a state in the *Work State* field, the options available in the *Work County* field will be limited to counties in the state selected. The three-digit numbers next to the values in the *Work City* field are county codes.

  **Note:** You must select at least a specific city from the *Work City* field in order to select a specific ZIP code and/or work location.

# APPENDIX C: DATA SELECTION TABS BY AREA OF ANALYSIS

### SUMMARY LEAVE—CONTINUED

- **Res Loc** – Use this tab to limit criteria by residence location. Available criteria are country, state, and county. Options available in the *Residence County* field are determined by the value selected in the *Residence State* field.

- **Group By** – Available Group By Choices: *Client Profile*; *FLSA*; *Home Agency*; *Home Organization*; *Leave Policy*; *Pay Class*; *Pay Period End Date*; *Payroll Number*; *Resident Country*; *Resident County*; *Resident State*; *Sub Title*; *Title Category*; *Title Group*; *Title*; *Work City*; *Work Country*; *Work County*; *Work Location*; *Work State*; *Work Zip Code*.

  Available Display Options: *Current Balance Amount* (required) and *Code Descriptions*, to display the long descriptions of codes. In addition, users may choose *Current Usage* and *Current Accrual Amount*, *LYTD* (Leave Year to Date) *Usage* and *Accrual Amount*, *MTD* (Month to Date) *Usage* and *Accrual Amount*, and *YTD* (Year to Date) *Usage* and *Accrual Amount*.

  **Note:** *Current* represents the usage and/or accrual that occurred within the date range specified on the <u>Date/GTN</u> selection tab. *Leave Year to Date* represents the usage and/or accrual that occurred within the Leave Year up to the date specified on the <u>Date/GTN</u> selection tab. An employee's Leave Year is the 12-month cycle beginning with the month the employee began accruing leave. *Month to Date* represents the usage and/or accrual that occurred within the current month up to the date specified on the <u>Date/GTN</u> selection tab. *Year to Date* represents the usage and/or accrual that occurred within the current calendar year (January to December) up the date specified on the <u>Date/GTN</u> selection tab.

  **Note:** The *Summary Leave* area does not give employee-specific information. Queries produce summarized leave amounts from the employees who meet the specified criteria.

  **Note:** Leave amounts are expressed in the Data Warehouse as minutes only (e.g., 3 hours and 15 minutes would be displayed as "195.00", *not* 3:15.

### SUMMARY PAYROLL

- **Date/GTN** – Selecting a payroll number on this tab will include data from all payrolls of that number within the date or GTN range selected.

- **Home COA**

# APPENDIX C: DATA SELECTION TABS BY AREA OF ANALYSIS

**SUMMARY PAYROLL—CONTINUED**

- **COA**
- **COA-More**
- **Title**
- **Attr** – Available criteria: *Payroll Event Category*; *Pay Class*; *GTN Run Type*.
- **Group By** – Available Group By Choices: *Activity*; *Agency*; *Appropriation*; *Function*; *Fund*; *GTN Run Number*; *GTN Run Type*; *Home/Charged Agency*; *Home/Charged Organization*; *Job*; *Object*; *Organization*; *Pay Class*; *Pay Period End Date*; *Payroll Event Category*; *Payroll Number*; *Reporting Category*; *Sub Object*; *Sub Organization*; *Sub Title*; *Title Category*; *Title Group*; *Title*.

  Available Display Options: *Pay Amount* (required) and *Code Descriptions*, to display the long descriptions of codes.

  **Note:** The *Summary Payroll* area does not give employee-specific information. Queries produce summarized dollar amounts from the employees who meet the specified criteria.

**SUMMARY POSITION**

- **Date** – This is always an "as of" date. Data returned will be the most current record as of the date entered.
- **Posn COA** – The options available *LDPR* field are determined by the value selected in the *Position Organization* field.
- **Position** – Use this tab to limit criteria by position status. Use the SHIFT (to select a range of statuses from the list) or CTRL (to select multiple statuses individually) keys to select more than one status to include in the query. Use the values in the *Permanent* field to select between permanent positions, temporary positions, or both.
- **Title**
- **Grade** – Use this tab to limit criteria by an overriding pay grade. Pay grades entered on Position Status Maintenance transactions (PSMT) in the desktop system override the pay grade associated with the position's title.

# APPENDIX C: DATA SELECTION TABS BY AREA OF ANALYSIS

### SUMMARY POSITION—CONTINUED

- **Group By** – Available Group By Choices: *First Allocated Date*; *LDPR*; *Override Grade*; *Permanent*; *Position Agency*; *Position Organization*; *Position Status*; *Sub Title*; *Title Category*; *Title Group*; *Title*.

  Available Display Options: *Position Count* (required) and *Code Descriptions*, to display the long descriptions of codes. If an organization was selected on the Posn COA selection tab, a Display Option of *Include Lower Level Position Organizations* will be offered as well.

  **Note:** The *Summary Position* area does not give position-specific information. Queries produce a count of the number of positions that meet the specified criteria.